



Level 7 NVQ Diploma in Construction Senior Management

Qualification Specification

Contents

| | Page |
|---|-------------|
| Introduction | 3 |
| Qualification profile | 3 |
| Qualification Structure | 4 |
| Centre requirements | 6 |
| Support for candidates | 6 |
| Links to National Standards / NOS mapping | 6 |
| Assessment | 7 |
| Internal quality assurance | 7 |
| Adjustments to assessment | 8 |
| Results enquiries and appeals | 8 |
| Certification | 8 |
| Units - learning outcomes and assessment criteria | 9 |

Introduction

The ProQual Level 7 Diploma in Construction Senior Management is aimed at senior managers in the construction industry working in a wide range of job roles.

The awarding body for this qualification is ProQual Awarding Body (www.proqualab.com) and the regulatory body is the Office of Qualifications and Examinations Regulation (Ofqual); It is also endorsed by the sector body for construction - CITB.

The qualification has been accredited onto the Regulated Qualifications Framework (RQF) and is published on Ofqual's Register of Qualifications.

Qualification Profile Level 7 NVQ Diploma in Construction Senior Management

| | |
|-----------------------------|---|
| Qualification title | ProQual Level 7 NVQ Diploma in Construction Senior Management |
| Ofqual qualification number | 603/0298/7 |
| Level | 7 |
| Total Qualification Time | 1440 hours (440 GLH) |
| Assessment | Pass or fail Internally assessed and verified by centre staff External quality assurance by ProQual verifiers |
| Qualification start date | 17/08/16 |
| Qualification end date | |

Entry Requirements

There are no formal entry requirements for this qualification.

Centres should carry out an **initial assessment** of candidate skills and knowledge to identify any gaps and help plan the assessment.

Qualification Structure

To achieve the qualification candidates must complete 4 Mandatory units in Group A plus a minimum of six units from two optional groups from Group B.

Group A Mandatory Units.

| Mandatory Units | | |
|-----------------|--|-------|
| Unit Ref. | Title | Level |
| K/615/1332 | Manage teams in construction | 7 |
| M/615/1333 | Lead and participate in meetings in construction management | 5 |
| T/615/1334 | Provide ethical advice, judgement and service in construction management | 7 |
| A/615/1335 | Develop self and others in construction management | 6 |

Group B Optional Units

Group B1 Project Development Units

| Optional Units | | |
|----------------|---|-------|
| Unit Ref. | Title | Level |
| F/615/1336 | Prepare and agree a project brief and development programme in construction | 7 |
| L/615/1338 | Manage design development and processes in construction | 7 |
| J/615/1337 | Assess and evaluate the environmental impact of developments in construction management | 7 |
| R/615/1339 | Evaluate sustainable resources and requirements in construction management | 6 |
| J/615/1340 | Manage marketing and customer service in construction organisations | 7 |

Group B2 Procurement Contracts and Budget Units

| Optional Units | | |
|----------------|---|-------|
| Unit Ref. | Title | Level |
| L/615/1341 | Implement strategic sourcing partnerships in construction management | 7 |
| R/615/1342 | Establish project procurement arrangements in construction management | 7 |
| Y/615/1343 | Manage procurement processes in construction management | 7 |
| D/615/1344 | Prepare and submit estimates, bids and tenders in construction management | 6 |
| H/615/1345 | Ensure that contracts are prepared, negotiated and concluded in construction management | 7 |
| K/615/1346 | Control organisational and project income and expenditure in construction management | 7 |

Group B3 Project Control Units

| Optional Units | | |
|-------------------|---|-------|
| Unit Ref. | Title | Level |
| M/615/1347 | Manage project risks and opportunities in construction | 7 |
| T/615/1348 | Manage project processes in construction | 7 |
| A/615/1349 | Manage project evaluation and feedback in construction | 7 |
| A/615/1383 | Control project outcomes in construction | 7 |
| M/615/1350 | Evaluate and progress the resolution of disputes in construction management | 7 |
| T/615/1351 | Manage project completion in construction | 6 |

Centre Requirements

Centres must be approved to offer this qualification. If your centre is not approved please complete and submit form **ProQual Additional Qualification Approval Application**.

Staff

Staff delivering this qualification must be appropriately qualified and/or occupationally competent.

Assessors/Internal Quality Assurance

Assessors for each unit must have verifiable, current industry experience and a sufficient depth of relevant occupational expertise and knowledge, and must use a combination of assessment methods as defined in the Consolidated Assessment Strategy.

Assessors and internal quality assurance verifiers for competence-based units or qualifications will normally need to hold appropriate assessor or internal quality assurance qualifications.

Support for Candidates

Materials produced by centres to support candidates should:

- enable them to track their achievements as they progress through the learning outcomes and assessment criteria;
- provide information on where ProQual's policies and procedures can be viewed;
- provide a means of enabling Internal and External Quality Assurance staff to authenticate evidence

Links to National Standards / NOS mapping

National Occupational Standards (NOS) are owned by a Sector Skills Council or Standard Setting Body and they describe the skills, knowledge and understanding needed to undertake a particular task or job at different levels of competence.

The structure and units of this qualification are based on NOS for the construction sector developed by CITB.

Assessment

This qualification is competence-based, candidates must demonstrate the level of competence described in the units. Assessment is the process of measuring a candidate's skill, knowledge and understanding against the standards set in the qualification.

The qualifications must be assessed in a work environment and in accordance with the ConstructionSkills' Consolidated Assessment Strategy for Construction and the Built Environment, and it must be internally assessed by an appropriately experienced and qualified assessor.

Each candidate is required to produce a portfolio of evidence which demonstrates their achievement of all of the learning outcomes and assessment criteria for each unit.

- Evidence can include:
- observation report by assessor
 - assignments/projects/reports
 - professional discussion
 - witness testimony
 - candidate product
 - worksheets
 - record of oral and written questioning
 - Recognition of Prior Learning

Learning outcomes set out what a candidate is expected to know, understand or be able to do.

Assessment criteria specify the standard a candidate must meet to show the learning outcome has been achieved.

Learning outcomes and assessment criteria can be found from page 9.

Internal Quality Assurance

An internal quality assurance verifier confirms that assessment decisions made in centres are made by competent and qualified assessors, that they are the result of sound and fair assessment practice and that they are recorded accurately and appropriately.

Adjustments to Assessment

Adjustments to standard assessment arrangements are made on the individual needs of candidates. ProQual's Reasonable Adjustments Policy and Special Consideration Policy sets out the steps to follow when implementing reasonable adjustments and special considerations and the service that ProQual provides for some of these arrangements.

Centres should contact ProQual for further information or queries about the contents of the policy.

Results Enquiries and Appeals

All enquiries relating to assessment or other decisions should be dealt with by centres, with reference to ProQual's Enquiries and Appeals Procedures.

Certification

Candidates who achieve the requirements for this qualification will be awarded:

- A certificate listing all units achieved, and
- A certificate giving the full qualification title -

ProQual Level 7 NVQ Diploma in Construction Senior Management

Claiming certificates

Centres may claim certificates for candidates who have been registered with ProQual and who have successfully achieved the qualification. All certificates will be issued to the centre for successful candidates.

Unit certificates

If a candidate does not achieve all of the units required for a qualification, the centre may claim a unit certificate for the candidate which will list all of the units achieved.

Replacement certificates

If a replacement certificate is required a request must be made to ProQual in writing. Replacement certificates are labelled as such and are only provided when the claim has been authenticated. Refer to the Fee Schedule for details of charges for replacement certificates.

Unit K/615/1332
Manage teams in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| 1 Be able to select and form a project team | 1.1 Identify the team resources that are needed and where they can be obtained, and select those that meet agreed timescales and budget limits 1.2 Identify any significant factors which will affect the number, type and availability of team resources 1.3 Evaluate the quality and potential reliability of team resources and circulate the results to decision makers 1.4 Negotiate and agree proposals of contractual arrangements for team resources which are likely to produce an effective team and follow necessary rules and formalities 1.5 Follow the rules and formalities for obtaining team resources |
| 2 Understand how to select and form a project team | 2.1 Describe how to identify the team resources that are needed and where they can be obtained, and select those that meet agreed timescales and budget limits 2.2 Describe how to identify any significant factors which will affect the number, type and availability of team resources 2.3 Evaluate the quality and potential reliability of team resources and circulate the results to decision makers 2.4 Propose how to negotiate and agree proposals of contractual arrangements for team resources which are likely to produce an effective team and follow necessary rules and formalities 2.5 Explain how to follow the rules and formalities for obtaining team resources |
| 3 Be able to recruit, select and keep colleagues | 3.1 Talk with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving 3.2 Identify ways of addressing staff turnover problems, implement those which clearly fall within your authority and communicate others to the relevant people for consideration 3.3 Review, on a regular basis, the work required in your area of responsibility, identify any shortfall in the number of colleagues and/or the pool of skills knowledge, understanding and experience 3.4 Identify and review the options for addressing any identified shortfalls and decide on the best options to follow 3.5 Consult with others to produce or update job descriptions and person specifications where there is a clear need to recruit |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: | |
|--------------------------------------|---|---|
| | 3.6 Consult with others to discuss and agree stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved | |
| | 3.7 Ensure that any information on vacancies is fair, clear and accurate before it goes to potential applicants | |
| | 3.8 Seek and make use of specialist expertise in relation to recruiting, selecting and keeping colleagues | |
| | 3.9 Participate in the recruitment and selection process, as agreed, making sure that the process is fair, consistent and effective | |
| | 3.10 Make sure that applicants who are offered positions are likely to be able to perform effectively and work with their new colleagues | |
| | 3.11 Judge whether the recruitment and selection process has been successful in relation to recent appointments in your area and identify any areas for improvements | |
| | 4 Understand how to recruit, select and keep colleagues | 4.1 Explain how to talk with colleagues who are leaving your area of responsibility to identify and discuss their reasons for leaving |
| | | 4.2 Describe how to identify ways of addressing staff turnover problems, implement those which clearly fall within your authority and communicating others to the relevant people for consideration |
| | | 4.3 Examine how to review, on a regular basis, the work required in your area of responsibility, identify any shortfall in the number of colleagues and/or the pool of skills knowledge, understanding and experience |
| | | 4.4 Describe how to identify and review the options for addressing any identified shortfalls and decide on the best options to follow |
| | | 4.5 Explain how to consult with others to produce or update job descriptions and person specifications where there is a clear need to recruit |
| | 4.6 Explain how to consult with others to discuss and agree stages in the recruitment and selection process for identified vacancies, the methods that will be used, the associated timings and who is going to be involved | |
| | 4.7 Explain how to ensure that any information on vacancies is fair, clear and accurate before it goes to potential applicants | |
| | 4.8 Explain how to seek and make use of specialist expertise in relation to recruiting, selecting and keeping colleagues | |
| | 4.9 Explain how to participate in the recruitment and selection process, as agreed, making sure that the process is fair, consistent and effective | |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| | <p>4.10 Explain how to make sure that applicants who are offered positions are likely to be able to perform effectively and work with their new colleagues</p> <p>4.11 Evaluate how to judge whether the recruitment and selection process has been successful in relation to recent appointments in your area and identify any areas for improvements</p> |
| 5 Be able to allocate and monitor the progress and quality of work in your area of responsibility | <p>5.1 Confirm the work required in your area of responsibility with your manager and seek clarification, where necessary, on any outstanding points and issues</p> <p>5.2 Plan how the work will be undertaken, seek views from people in your area of responsibility, identify any priorities or critical activities and make best use of the available resources</p> <p>5.3 Ensure that work is allocated to individuals and/or teams on a fair basis taking account of skills, knowledge and understanding, experience and workloads and the opportunity for development</p> <p>5.4 Ensure that individuals and/or teams are briefed on allocated work, showing how it fits with the vision and objectives for the area and the overall organisation, and the standard or level of expected performance</p> <p>5.5 Encourage individuals and/or team members to ask questions, make suggestions and seek clarification in relation to allocated work</p> <p>5.6 Monitor the progress and quality of the work of individuals and/or teams on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback</p> <p>5.7 Support individuals and/or teams in identifying and dealing with problems and unforeseen events</p> <p>5.8 Motivate individual and/or teams to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion</p> <p>5.9 Monitor your area for conflict, identify the cause(s) when it occurs and deal with it promptly and effectively</p> <p>5.10 Identify unacceptable or poor performance, discussing the cause(s) and agree ways of improving performance with individuals and/or teams</p> <p>5.11 Recognise successful completion of significant pieces of work or work activities by individuals and/or teams</p> <p>5.12 Use information collected on the performance of individuals and/or teams in any formal appraisals of performance</p> <p>5.13 Review and update plans of work for your area and clearly communicate any changes to those affected</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| 6 Understand how to allocate and monitor the progress and quality of work in your area of responsibility | <p>6.1 Explain how to confirm the work required in your area of responsibility with your manager and seek clarification, where necessary, on any outstanding points and issues</p> <p>6.2 Propose how to plan how the work will be undertaken, seek views from people in your area of responsibility, identify any priorities or critical activities and make best use of the available resources</p> <p>6.3 Explain how to ensure that work is allocated to individuals and/or teams on a fair basis taking account of skills, knowledge and understanding, experience and workloads and the opportunity for development</p> <p>6.4 Explain how to ensure that individuals and/or teams are briefed on allocated work, show how it fits with the vision and objectives for the area and the overall organisation, and the standard or level of expected performance</p> <p>6.5 Explain how to encourage individuals and/or team members to ask questions, make suggestions and seek clarification in relation to allocated work</p> <p>6.6 Examine how to monitor the progress and quality of the work of individuals and/or teams on a regular and fair basis against the standard or level of expected performance and provide prompt and constructive feedback</p> <p>6.7 Examine how to support individuals and/or teams in identifying and dealing with problems and unforeseen events</p> <p>6.8 Explain how to motivate individual and/or teams to complete the work they have been allocated and provide, where requested and where possible, any additional support and/or resources to help completion</p> <p>6.9 Examine how to monitor your area for conflict, identify the cause(s) when it occurs and deal with it promptly and effectively</p> <p>6.10 Describe how to identify unacceptable or poor performance, discuss the cause(s) and agree ways of improving performance with individuals and/or teams</p> <p>6.11 Explain how to recognise successful completion of significant pieces of work or work activities by individuals and/or teams</p> <p>6.12 Explain how to use information collected on the performance of individuals and/or teams in any formal appraisals of performance</p> <p>6.13 Examine how to review and update plans of work for your area and clearly communicate any changes to those affected</p> |
| 7 Be able to develop productive working relationships with colleagues and stakeholders | <p>7.1 Identify stakeholders and the background to and nature of their interest in the activities and performance of the organisation</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| | <p>7.2 Establish working relationships with relevant colleagues and stakeholders.</p> <p>7.3 Recognise and respecting the roles, responsibilities, interests and concerns of colleagues and stakeholders</p> <p>7.4 Provide colleagues and stakeholders with appropriate information to enable them to perform effectively</p> <p>7.5 Consult colleagues and stakeholders in relation to key decisions and activities and taking account of their views, including their priorities, expectations and attitudes to potential risks.</p> <p>7.6 Fulfil agreements made with colleagues and stakeholders and letting them know</p> <p>7.7 Advising colleagues and stakeholders promptly of any difficulties or where it will be impossible to fulfil agreements</p> <p>7.8 Identify and sort out conflicts of interest and disagreements with colleagues and stakeholders in ways that minimise damage to work and activities and to the individuals and organisations involved</p> <p>7.9 Monitor and review the effectiveness of working relationships with colleagues and stakeholders, seek and provide feedback, in order to identify areas for improvement</p> <p>7.10 Monitor wider developments in order to identify issues of potential interest or concern to stakeholders in the future and to identify new stakeholders</p> |
| 8 Understand how to develop productive working relationships with colleagues and stakeholders | <p>8.1 Describe how to identify stakeholders and the background to and nature of their interest in the activities and performance of the organisation</p> <p>8.2 Propose how to establish working relationships with relevant colleagues and stakeholders.</p> <p>8.3 Explain how to recognise and respect the roles, responsibilities, interests and concerns of colleagues and stakeholders</p> <p>8.4 Explain how to provide colleagues and stakeholders with appropriate information to enable them to perform effectively</p> <p>8.5 Explain how to consult colleagues and stakeholders in relation to key decisions and activities and take account of their views, including their priorities, expectations and attitudes to potential risks.</p> <p>8.6 Explain how to fulfil agreements made with colleagues and stakeholders and letting them know</p> <p>8.7 Propose how to advise colleagues and stakeholders promptly of any difficulties or where it will be impossible to fulfil agreements</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|---|
| | <p>8.8 Describe how to identify and sort out conflicts of interest and disagreements with colleagues and stakeholders in ways that minimise damage to work and activities and to the individuals and organisations involved</p> <p>8.9 Examine how to monitor and review the effectiveness of working relationships with colleagues and stakeholders, seek and provide feedback, in order to identify areas for improvement</p> <p>8.10 Examine how to monitor wider developments in order to identify issues of potential interest or concern to stakeholders in the future and to identify new stakeholders</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit M/615/1333

Lead and participate in meetings in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 1 Be able to lead meetings | <ul style="list-style-type: none"> 1.1 establish the purpose and objectives of the meeting and confirm that a meeting is the best way to achieve these objectives 1.2 prepare carefully how you will lead the meeting and identify who needs to participate 1.3 invite participants, give them sufficient notice to enable them to attend, and state the importance of the meeting, the role they will be expected to play, and the preparation they need to do 1.4 circulate relevant information in advance and, if required, brief participants individually on the context and purpose of the meeting and their roles 1.5 set a fixed time for the meeting to begin and end and allocate time appropriately for each agenda item. 1.6 state the purpose of the meeting at the start and check that all participants understand why they are present 1.7 clarify specific objectives at the beginning of each agenda item 1.8 encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledging and building on the contributions of other participants 1.9 discourage unhelpful comments and digressions and refocus attention on the objectives of the meeting 1.10 manage time flexibly, give more time to particular agenda items, if necessary, whilst ensure key objectives are met and participants are kept informed of changes in the agenda 1.11 summarise the discussion at appropriate times and allocate action points to participants at the end of each agenda item 1.12 take decisions within the meeting's authority, remit or terms of reference 1.13 observe any formal procedures or standing orders that apply to the meeting 1.14 check that decisions and action points are accurately recorded and promptly communicated to those who need to know 1.15 evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective |
| 2 Understand how to lead meetings | <ul style="list-style-type: none"> 2.1 Propose how to establish the purpose and objectives of the meeting and confirm that a meeting is the best way to achieve these objectives 2.2 Explain how to prepare carefully how you will lead the meeting and identify who needs to participate 2.3 Explain how to invite participants, give them sufficient notice to enable them to attend, and state the importance of the meeting, the role they will be expected to play, and the preparation they need to do 2.4 Explain how to circulate relevant information in advance and, if required, brief participants individually on the context and purpose of the meeting and their roles |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | <p>2.5 Explain how to set a fixed time for the meet to begin and end and allocate time appropriately for each agenda item.</p> <p>2.6 Explain how to state the purpose of the meeting at the start and check that all participants understand why they are present</p> <p>2.7 Explain how to clarify specific objectives at the beginning of each agenda item</p> <p>2.8 Explain how to encourage all participants to make clear, concise and constructive contributions from their perspectives, whilst acknowledge and building on the contributions of other participants</p> <p>2.9 Explain how to discourage unhelpful comments and digressions and refocus attention on the objectives of the meeting</p> <p>2.10 Evaluate how to manage time flexibly, give more time to particular agenda items, if necessary, whilst ensuring key objectives are met and participants are kept informed of changes in the agenda</p> <p>2.11 Explain how to summarise the discussion at appropriate times and allocate action points to participants at the end of each agenda item</p> <p>2.12 Evaluate how to take decisions within the meeting's authority, remit or terms of reference</p> <p>2.13 Explain how to observe any formal procedures or standing orders that apply to the meeting</p> <p>2.14 Explain how to check that decisions and action points are accurately recorded and promptly communicated to those who need to know</p> <p>2.15 Evaluate whether the purpose and objectives of the meeting have been achieved and how future meetings could be made more effective</p> |
| 3 Be able to participate in meetings | <p>3.1 Brief yourself on the content of the meeting, identify relevant information and clarify your opinions on various agenda items.</p> <p>3.2 consult with those who have an interest in the various agenda items in order to understand and be able to represent their opinions.</p> <p>3.3 clarify your objectives from the meeting what you hope the meeting will achieve.</p> <p>3.4 Present relevant information to the meeting clearly and concisely.</p> <p>3.5 Present your opinions and the interests of those you are representing in a convincing way, provide evidence to support your case, if required.</p> <p>3.6 Articulate any issues and problems emerging from discussions and propose and evaluate possible solutions.</p> <p>3.7 acknowledge and constructively discuss information and opinions provided by other people.</p> <p>3.8 clarify decisions taken on the various agenda items, where necessary.</p> <p>3.9 communicate decisions clearly and concisely and in a timely way to those who have an interest in the various agenda items, in line with any communication protocol agreed at the meeting.</p> |
| 4 Understand how to participate in meetings | <p>4.1 Explain how to brief yourself on the content of the meeting, identify relevant information and clarify your opinions on various agenda items.</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| | <ul style="list-style-type: none">4.2 Explain how to consult with those who have an interest in the various agenda items in order to understand and be able to represent their opinions.4.3 Explain how to clarify your objectives from the meeting what you hope the meeting will achieve.4.4 Explain how to present relevant information to the meeting clearly and concisely.4.5 Explain how to present your opinions and the interests of those you are represent in a convincing way, provide evidence to support your case, if required.4.6 Explain how to articulate any issues and problems emerging from discussions and propose and evaluate possible solutions.4.7 Explain how to acknowledge and constructively discuss information and opinions provided by other people.4.8 Explain how to clarify decisions taken on the various agenda items, where necessary.4.9 Explain how to communicate decisions clearly and concisely and in a timely way to those who have an interest in the various agenda items, in line with any communication protocol agreed at the meeting. |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit T/615/1334

Provide ethical advice, judgement and service in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to exchange information and present advice on technical issues | 1.1 obtain and evaluate information which is sufficiently detailed for the purpose 1.2 present technical information and advice which is complete, summarised accurately and relevant to technical issues 1.3 present technical recommendations which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available 1.4 give technical instructions and guidance which are likely to be understood by the people who will follow them 1.5 present technical recommendations and advice use a style of communication which is appropriate to the people receiving information and advice 1.6 adapt and modify technical recommendations where people have difficulties understanding them |
| 2 Understand how to exchange information and present advice on technical issues | 2.1 Explain how to obtain and evaluate information which is sufficiently detailed for the purpose 2.2 Explain how to present technical information and advice which is complete, summarised accurately and relevant to technical issues 2.3 Explain how to present technical recommendations which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available 2.4 Propose how to give technical instructions and guidance which are likely to be understood by the people who will follow them 2.5 Explain how to present technical recommendations and advice use a style of communication which is appropriate to the people receiving information and advice 2.6 Explain how to adapt and modify technical recommendations where people have difficulties understanding them |
| 3 Be able to resolve complex, indeterminate situations | 3.1 identify where complex, indeterminate situations exist, estimate their effects realistically and summarise the issues for the organisation 3.2 assess the validity and completeness of the information available and identify any significant gaps 3.3 specify and obtain sufficient additional information to cover any gaps and to provide a valid starting point for the analysis of the situation 3.4 analyse information and draw valid and justifiable conclusions 3.5 apply decision making techniques which increase the reliability of the conclusions 3.6 reflect on the conclusions and interpret them into detailed issues that enable known opportunities and solutions to be identified and utilised for establish policy |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 4 Understand how to resolve complex, indeterminate situations | <p>4.1 Describe how to identify where complex, indeterminate situations exist, estimate their effects realistically and summarise the issues for the organisation</p> <p>4.2 Examine how to assess the validity and completeness of the information available and identify any significant gaps</p> <p>4.3 Evaluate how to specify and obtain sufficient additional information to cover any gaps and to provide a valid starting point for the analysis of the situation</p> <p>4.4 Examine how to analyse information and draw valid and justifiable conclusions</p> <p>4.5 Explain how to apply decision making techniques which increase the reliability of the conclusions</p> <p>4.6 Examine how to reflect on the conclusions and interpret them into detailed issues that enable known opportunities and solutions to be identified and utilised for establish policy</p> |
| 5 Be able to practice within an ethical framework | <p>5.1 make judgements and offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected</p> <p>5.2 take clear and unequivocal personal responsibility for personal decisions</p> <p>5.3 disclose information obtained from clients only to people who have a right to receive it</p> <p>5.4 communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust</p> <p>5.5 define and agree the terms of reference and the expectations of the people involved in contracts</p> <p>5.6 enter into contracts and agreements which conform to legal requirements, ethical standards and recognised good practice</p> <p>5.7 refuse offers and contracts which may generate conflicts of interest</p> <p>5.8 set up and implement systems to protect individual, organisational and community interests</p> |
| 6 Understand how to practice within an ethical framework | <p>6.1 Evaluate how to make judgements and offering advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected</p> <p>6.2 Evaluate how to take clear and unequivocal personal responsibility for personal decisions</p> <p>6.3 Explain how to disclose information obtained from clients only to people who have a right to receive it</p> <p>6.4 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust</p> <p>6.5 Evaluate how to define and agree the terms of reference and the expectations of the people involved in contracts</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|---|
| | <p>6.6 Evaluate how to enter into contracts and agreements which conform to legal requirements, ethical standards and recognised good practice</p> <p>6.7 Evaluate how to refuse offers and contracts which may generate conflicts of interest</p> <p>6.8 Propose how to set up and implement systems to protect individual, organisational and community interests</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit A/615/1335

Develop self and others in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to manage your own resources and undertake continuing personal development in the occupational practice area | <ul style="list-style-type: none"> 1.1 Develop and maintain personal networks of contacts, which are appropriate to meet your current and future needs for information and resources 1.2 Check, on a regular basis, how you are using your time at work and identify possible improvements 1.3 Ensure that your performance consistently meets or goes beyond agreed requirements 1.4 Get regular and useful feedback on your performance from those who are in a good position to judge it and provide you with objective and valid feedback 1.5 Discuss and agree, with those you report to, any changes to your personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes 1.6 Define the personal aims and objectives for undertaking personal development 1.7 Identify and contact sources of support and guidance for undertaking personal development 1.8 Identify and select relevant standards of competence against which personal development can be measured 1.9 Analyse the current personal level of performance against the identified standards of competence and record a profile of present competence and personal development needs 1.10 Prepare a development plan for achieving identified development needs 1.11 Undertake development activities aimed at achieving identified development needs, review and record progress and the effectiveness of the activities 1.12 Measure the achievement of identified development needs and record evidence of competence gained against the identified standards of competence 1.13 Review the cycle of personal development aims and objectives and revise and update aims and objectives to suit changing circumstances |
| 2 Understand how to manage your own resources and undertake continuing personal development in the occupational practice area | <ul style="list-style-type: none"> 2.1 Propose how to develop and maintain personal networks of contacts, which are appropriate to meet your current and future needs for information and resources 2.2 Explain how to check, on a regular basis, how you are using your time at work and identify possible improvements 2.3 Explain how to ensure that your performance consistently meets or goes beyond agreed requirements |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| | <p>2.4 Explain how to get regular and useful feedback on your performance from those who are in a good position to judge it and provide you with objective and valid feedback</p> <p>2.5 Explain how to discuss and agree, with those you report to, any changes to your personal work objectives and development plan in the light of performance, feedback received, any development activities undertaken and any wider changes</p> <p>2.6 Evaluate how to define the personal aims and objectives for undertaking personal development</p> <p>2.7 Describe how to identify and contact sources of support and guidance for undertaking personal development</p> <p>2.8 Describe how to identify and select relevant standards of competence against which personal development can be measured</p> <p>2.9 Examine how to analyse the current personal level of performance against the identified standards of competence and record a profile of present competence and personal development needs</p> <p>2.10 Explain how to prepare a development plan for achieving identified development needs</p> <p>2.11 Evaluate how to undertake development activities aimed at achieving identified development needs, review and record progress and the effectiveness of the activities</p> <p>2.12 Explain how to measure the achievement of identified development needs and record evidence of competence gained against the identified standards of competence</p> <p>2.13 Examine how to review the cycle of personal development aims and objectives and revise and update aims and objectives to suit changing circumstances</p> |
| <p>3 Be able to enable people to learn and benefit from your experience</p> | <p>3.1 Identify and offer adequate and appropriate opportunities and resources for people to learn</p> <p>3.2 Select and summarise relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials</p> <p>3.3 Advise and coach people so that they can identify their current level of competence, their learning needs and targets</p> <p>3.4 Select and use appropriate learning techniques and methods which are suitable for the topic and the needs of the individual</p> <p>3.5 Present information to people use a pace, style and form which is appropriate to their needs</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| | <p>3.6 Encourage people to ask questions, seek clarification and advice when they need help and during learning activities</p> <p>3.7 Review peoples' progress towards agreed objectives and give realistic and positive feedback on achievements</p> <p>3.8 Identify, through discussion with people, areas where they need help to achieve their agreed competence levels and use the information to produce an agreed personal development plan</p> |
| <p>4 Understand how to enable people to learn and benefit from your experience</p> | <p>4.1 Describe how to identify and offer adequate and appropriate opportunities and resources for people to learn</p> <p>4.2 Evaluate how to select and summarise relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials</p> <p>4.3 Propose how to advise and coach people so that they can identify their current level of competence, their learning needs and targets</p> <p>4.4 Evaluate how to select and use appropriate learning techniques and methods which are suitable for the topic and the needs of the individual</p> <p>4.5 Explain how to present information to people use a pace, style and form which is appropriate to their needs</p> <p>4.6 Explain how to encourage people to ask questions, seek clarification and advice when they need help and during learning activities</p> <p>4.7 Examine how to review peoples' progress towards agreed objectives and give realistic and positive feedback on achievements</p> <p>4.8 Describe how to identify, through discussion with people, areas where they need help to achieve their agreed competence levels and use the information to produce an agreed personal development plan</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit F/615/1336

Prepare and agree a project brief and development programme in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| 1 Be able to prepare proposal for a project brief | 1.1 Identify and agree the stakeholders' requirements, opinions and aspirations and prepare a framework for a proposed project 1.2 Select data which is relevant and valid, analyse it and qualify its status 1.3 Estimate and confirm the cost and timescale of the project 1.4 Review the cost implications of adopting alternative design, construction, services, financing and using strategies and agree them with stakeholders 1.5 Prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders 1.6 Explain and discuss any significant constraints, framework opportunities and areas of uncertainty 1.7 Modify the draft to reflect the discussion and relevant points which have been raised 1.8 Negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project |
| 2 Understand how to prepare proposal for a project brief | 2.1 Describe how to identify and agree the stakeholders' requirements, opinions and aspirations and prepare a framework for a proposed project 2.2 Evaluate how to select data which is relevant and valid, analyse it and qualify its status 2.3 Examine how to estimate and confirm the cost and timescale of the project 2.4 Examine how to review the cost implications of adopting alternative design, construction, services, financing and using strategies and agree them with stakeholders 2.5 Explain how to prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders 2.6 Explain how to explain and discuss any significant constraints, framework opportunities and areas of uncertainty 2.7 Explain how to modify the draft to reflect the discussion and relevant points which have been raised 2.8 Propose how to negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project |
| 3 Be able to develop a programme which meets the requirements of the project brief | 3.1 Review the requirements of the brief and check and clarify initial assumptions about the project development programme with stakeholders |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | <p>3.2 Develop a realistic outline development programme which takes account of identified constraints</p> <p>3.3 Discuss the outline development programme with stakeholders and agree any necessary modifications to the brief, outline development programme, or constraints</p> <p>3.4 Prepare, present and agree a development programme which meets the requirements of the brief and the expectations of stakeholders</p> |
| 4 Understand how to develop a programme which meets the requirements of the project brief | <p>4.1 Examine how to review the requirements of the brief and check and clarify initial assumptions about the project development programme with stakeholders</p> <p>4.2 Propose how to develop a realistic outline development programme which takes account of identified constraints</p> <p>4.3 Explain how to discuss the outline development programme with stakeholders and agree any necessary modifications to the brief, outline development programme, or constraints</p> <p>4.4 Explain how to prepare, present and agree a development programme which meets the requirements of the brief and the expectations of stakeholders</p> |
| 5 Be able to identify, assess and agree project requirements and stakeholder preferences | <p>5.1 Clarify the project stakeholders' understanding of project processes and the roles of those who need to be involved</p> <p>5.2 Identify and agree with project stakeholders what their goals and priorities are both now and for the future</p> <p>5.3 Clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project</p> <p>5.4 Summarise and present the project requirements and stakeholders' preferences</p> |
| 6 Understand how to identify, assess and agree project requirements and stakeholder preferences | <p>6.1 Explain how to clarify the project stakeholders' understanding of project processes and the roles of those who need to be involved</p> <p>6.2 Describe how to identify and agree with project stakeholders what their goals and priorities are both now and for the future</p> <p>6.3 Explain how to clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project</p> <p>6.4 Explain how to summarise and present the project requirements and stakeholders' preferences</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit L/615/1338

Manage design development and processes in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to identify and assess hazards, and identify risks | 1.1 Check that clients are made aware of the relevant health and safety regulations and legal framework their obligations in relation to them and advantages in complying with them 1.2 Collaborate with interested parties to ensure the compliance of designs with relevant health and safety regulations and legal framework 1.3 Identify operations and individual activities that may give rise to hazards 1.4 Identify and prioritise the hazards arising from operations and individual activities 1.5 Obtain accurate information on any potential factors resulting from the hazards 1.6 Assess the hazards to identify risks on an iterative basis throughout the development process |
| 2 Understand how to identify and assess hazards, and identify risks | 2.1 Explain how to check that clients are made aware of the relevant health and safety regulations and legal framework their obligations in relation to them and advantages in complying with them 2.2 Describe how to collaborate with interested parties to ensure the compliance of designs with relevant health and safety regulations and legal framework 2.3 Describe how to identify operations and individual activities that may give rise to hazards 2.4 Describe how to identify and prioritise the hazards arising from operations and individual activities 2.5 Explain how to obtain accurate information on any potential factors resulting from the hazards 2.6 Examine how to assess the hazards to identify risks on an iterative basis throughout the development process |
| 3 Be able to make design choices to reduce health and safety risks | 3.1 Eliminate identified hazards whilst developing and modify designs and taking into account conflicting demands 3.2 Reduce identified risks arising from hazards that are not eliminated when developing and modifying designs 3.3 Give collective measures priority over individual measures when reducing risks 3.4 Verify that the risk reduction measures comply with relevant health and safety regulations and guidelines 3.5 Record in design documentation any information needed by other involved people, so that they can comply with their duties under relevant health and safety regulations 3.6 Use opportunities to promote the implementation of the risk reduction measures with other involved people 3.7 Encourage a culture of health, safety and welfare in design processes and decision making |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 4 Understand how to make design choices to reduce health and safety risks | <p>4.1 Explain how to eliminate identified hazards whilst developing and modify designs and take into account conflicting demands</p> <p>4.2 Evaluate how to reduce identified risks arising from hazards that are not eliminated when developing and modifying designs</p> <p>4.3 Examine how to give collective measures priority over individual measures when reducing risks</p> <p>4.4 Examine how to verify that the risk reduction measures comply with relevant health and safety regulations and guidelines</p> <p>4.5 Explain how to record in design documentation any information needed by other involved people, so that they can comply with their duties under relevant health and safety regulations</p> <p>4.6 Explain how to use opportunities to promote the implementation of the risk reduction measures with other involved people</p> <p>4.7 Explain how to encourage a culture of health, safety and welfare in design processes and decision making</p> |
| 5 Be able to manage the design process | <p>5.1 Review the findings of investigations and identify significant factors which may influence existing and anticipated development and design</p> <p>5.2 Analyse the information available with the project team and produce realistic design parameters which recognise the significant factors</p> <p>5.3 Assess the design parameters, circulate the assessment to the people responsible for project design, plan and scheduling</p> <p>5.4 Identify the parts of the project design which interact with each other, and agree suitable ways to maintain coherence and consistency between all significant factors influencing the design</p> <p>5.5 Set up procedures which will maintain coherence and consistency between the design solutions and the overall development concept</p> <p>5.6 Confirm techniques which are suitable for investigating, calculating, testing, developing and specifying design solutions</p> |
| 6 Understand how to manage the design process | <p>6.1 Examine how to review the findings of investigations and identify significant factors which may influence existing and anticipated development and design</p> <p>6.2 Examine how to analyse the information available with the project team and produce realistic design parameters which recognise the significant factors</p> <p>6.3 Examine how to assess the design parameters, circulate the assessment to the people responsible for project design, plan and scheduling</p> <p>6.4 Describe how to identify the parts of the project design which interact with each other, and agree suitable ways to maintain coherence and consistency between all significant factors influencing the design</p> <p>6.5 Propose how to set up procedures which will maintain coherence and consistency between the design solutions and the overall development concept</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|--|
| | 6.6 Explain how to confirm techniques which are suitable for investigating, calculating, testing, developing and specifying design solutions |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit J/615/1337

Assess and evaluate the environmental impact of developments in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to identify and evaluate sustainable resources | 1.1 Investigate, from appropriate information sources, the factors which impact on the utilisation and sustainability of finite and renewable resources 1.2 Assess accurately the costs and implications of the management and replacement of renewable resources 1.3 Identify and summarise appropriate and valid information sources and identify potential alternative resources 1.4 Compare the technical performance and environmental implications of alternative resources with the performance of existing finite resources with a similar function and calculate any variances 1.5 Investigate, assess and recommend suitable strategies for developing alternative resources, which indicate positive technical and environmental advantages |
| 2 Understand how to identify and evaluate sustainable resources | 2.1 Examine how to investigate, from appropriate information sources, the factors which impact on the utilisation and sustainability of finite and renewable resources 2.2 Examine how to assess accurately the costs and implications of the management and replacement of renewable resources 2.3 Describe how to identify and summarise appropriate and valid information sources and identify potential alternative resources 2.4 Propose how to compare the technical performance and environmental implications of alternative resources with the performance of existing finite resources with a similar function and calculate any variances 2.5 Examine how to investigate, assess and recommend suitable strategies for developing alternative resources, which indicate positive technical and environmental advantages |
| 3 Be able to investigate, evaluate and present sustainable requirements | 3.1 Identify goals and priorities for potential development, both currently and in the future 3.2 Investigate whether there is a justifiable need to undertake development and considering alternatives 3.3 Investigate and identify the design, function and performance requirements of the potential project 3.4 Investigate economic factors and resources, environmental and ecological factors, and social views that affect the future asset value and sustainability of potential development 3.5 Evaluate the best balance between the potential asset value and sustainability and project design, function, performance and return on investment 3.6 Present development strategies in a suitable format and justify them to decision makers |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| 4 Understand how to investigate, evaluate and present sustainable requirements | <ul style="list-style-type: none"> 4.1 Describe how to identify goals and priorities for potential development, both currently and in the future 4.2 Examine how to investigate whether there is a justifiable need to undertake development and consider alternatives 4.3 Examine how to investigate and identify the design, function and performance requirements of the potential project 4.4 Examine how to investigate economic factors and resources, environmental and ecological factors, and social views that affect the future asset value and sustainability of potential development 4.5 Evaluate the best balance between the potential asset value and sustainability and project design, function, performance and return on investment 4.6 Explain how to present development strategies in a suitable format and justify them to decision makers |
| 5 Be able to assess the environmental impact of development proposals | <ul style="list-style-type: none"> 5.1 Investigate the requirements for assessing the environmental impact of proposals by examining policy documents, consulting stakeholders and consulting experts 5.2 Select the factors which will be included in the assessment and the criteria to be used for assessing the impact 5.3 Collate relevant data and examine the proposal in its context 5.4 Identify and review alternative solutions which will improve environmental quality and increase sustainability 5.5 Analyse and forecast the environmental impact of the selected factors, both individually and in combination 5.6 Assess, quantify and report on the significance of each factor and suggest measures which will reduce the environmental impact |
| 6 Understand how to assess the environmental impact of development proposals | <ul style="list-style-type: none"> 6.1 Examine how to investigate the requirements for assessing the environmental impact of proposals by examining policy documents, consulting stakeholders and consulting experts 6.2 Evaluate how to select the factors which will be included in the assessment and the criteria to be used for assessing the impact 6.3 Explain how to collate relevant data and examine the proposal in its context 6.4 Describe how to identify and review alternative solutions which will improve environmental quality and increase sustainability 6.5 Examine how to analyse and forecast the environmental impact of the selected factors, both individually and in combination 6.6 Examine how to assess, quantify and report on the significance of each factor and suggest measures which will reduce the environmental impact |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit R/615/1339

Evaluate sustainable resources and requirements in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 1 Be able to establish arrangements for sustainable development | 1.1 Select and appoint development teams using sound criteria 1.2 Identify and allocate project environment and sustainability responsibilities 1.3 Select contractors by considering their adoption of sustainability policies and management 1.4 Identify, minimise and manage project risks by assessing best practice and adopting sustainability policies 1.5 Confirm the design, function and performance requirements of the potential project by accounting for identified project risks in order to achieve sustainable development |
| 2 Understand how to establish arrangements for sustainable development | 2.1 Evaluate how to select and appoint development teams using sound criteria 2.2 Describe how to identify and allocate project environment and sustainability responsibilities 2.3 Evaluate how to select contractors by considering their adoption of sustainability policies and management 2.4 Describe how to identify, minimise and manage project risks by assessing best practice and adopting sustainability policies 2.5 Explain how to confirm the design, function and performance requirements of the potential project by accounting for identified project risks in order to achieve sustainable development |
| 3 Be able to assess and provide for the conservation of energy use | 3.1 Review legislative requirements in order to identify the energy use and control criteria relevant to the type of development 3.2 Ensure that the information on the development necessary to assess energy use is gathered and recorded 3.3 Ensure that solutions which meet the criteria for the type of development are reviewed, calculated and specified 3.4 Prescribe commissioning procedures and certification necessary for development 3.5 Identify and define any consequent improvements that may be required to meet energy use and control criteria relevant to the type of development 3.6 Provide operating and maintenance instructions to users to enable developments to be operated in an energy efficient manner |
| 4 Understand how to assess and provide for the conservation of energy use | 4.1 Examine how to review legislative requirements in order to identify the energy use and control criteria relevant to the type of development 4.2 Explain how to ensure that the information on the development necessary to assess energy use is gathered and recorded |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|--|
| | <ul style="list-style-type: none">4.3 Explain how to ensure that solutions which meet the criteria for the type of development are reviewed, calculated and specified4.4 Evaluate how to prescribe commissioning procedures and certification necessary for development4.5 Describe how to identify and define any consequent improvements that may be required to meet energy use and control criteria relevant to the type of development4.6 Explain how to provide operating and maintenance instructions to users to enable developments to be operated in an energy efficient manner |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit J/615/1340

Manage marketing and customer service in construction organisations

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to identify and resource the development of new products and services to meet market needs | 1.1 Review the organisation's operations and evaluate its strengths and weaknesses to compete in potential markets 1.2 Identify appropriate and realistic market areas for the organisation and summarise the information accurately 1.3 Analyse the demand for and type of new products and services within the identified market areas 1.4 Identify opportunities to use new technologies, materials and techniques to meet identified market needs 1.5 Ensure that the resources needed are calculated accurately and that sufficient resources are allocated for the development of new products and services 1.6 Negotiate additional resources in cases where existing resources are insufficient to meet development costs 1.7 Select new and innovative products and services for development which are based on an accurate evaluation of the organisation's business policy |
| 2 Understand how to identify and resource the development of new products and services to meet market needs | 2.1 Examine how to review the organisation's operations and evaluate its strengths and weaknesses to compete in potential markets 2.2 Describe how to identify appropriate and realistic market areas for the organisation and summarise the information accurately 2.3 Examine how to analyse the demand for and type of new products and services within the identified market areas 2.4 Explain how to identify opportunities to use new technologies, materials and techniques to meet identified market needs 2.5 Explain how to ensure that the resources needed are calculated accurately and that sufficient resources are allocated for the development of new products and services 2.6 Propose how to negotiate additional resources in cases where existing resources are insufficient to meet development costs 2.7 Evaluate how to select new and innovative products and services for development which are based on an accurate evaluation of the organisation's business policy |
| 3 Be able to develop and implement a marketing strategy | 3.1 Evaluate the present image and reputation of the organisation with the target audience and identify the potential client base |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| | <p>3.2 Develop an information gathering system to support the development of marketing and promotion strategies</p> <p>3.3 Identify and agree potential new business opportunities</p> <p>3.4 Evaluate marketing and promotion options and develop a clear and relevant strategy which is capable of making a significant impact on the target audience</p> <p>3.5 Choose methods, media and techniques for the marketing and promotion of the organisation which are consistent with the corporate image</p> <p>3.6 Negotiate, agree and implement a programme and budget to deliver the agreed marketing and promotion strategy</p> <p>3.7 Monitor the marketing and promotion strategy regularly, review the impact and make modifications which will improve market presence and penetration</p> |
| <p>4 Understand how to develop and implement a marketing strategy</p> | <p>4.1 Evaluate the present image and reputation of the organisation with the target audience and identify the potential client base</p> <p>4.2 Propose how to develop an information gathering system to support the development of marketing and promotion strategies</p> <p>4.3 Describe how to identify and agree potential new business opportunities</p> <p>4.4 Evaluate how to evaluate marketing and promotion options and develop a clear and relevant strategy which is capable of making a significant impact on the target audience</p> <p>4.5 Evaluate how to choose methods, media and techniques for the marketing and promotion of the organisation which are consistent with the corporate image</p> <p>4.6 Propose how to negotiate, agree and implement a programme and budget to deliver the agreed marketing and promotion strategy</p> <p>4.7 Examine how to monitor the marketing and promotion strategy regularly, review the impact and make modifications which will improve market presence and penetration</p> |
| <p>5 Be able to develop and maintain a policy to maximise client and customer satisfaction</p> | <p>5.1 Summarise and analyse appropriate market research and assess realistically the type and quality of services clients and customers will need</p> <p>5.2 Develop a clear and realistic client and customer service policy, justify it and agree it with decision makers</p> <p>5.3 Develop a policy for client and customer service which summarises the organisation's agreed policy and circulate it to all the workforce</p> |

Units – Learning Outcomes and Assessment Criteria

Learning Outcome - The learner will:

Assessment Criterion - The learner can:

- 5.4 Develop and introduce an appropriate client and customer service system, which will meet the service needs
- 5.5 Develop and introduce systems for obtaining client and customer feedback and monitor them regularly for both positive and negative feedback
- 5.6 Summarise positive client and customer feedback and circulate it to decision makers
- 5.7 Summarise and investigate negative client and customer feedback, responding to individual complaints promptly and resolving cases
- 5.8 Produce regular summaries of client and customer complaints, the action taken and recommendations for future action and circulate the summaries to decision makers

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit L/615/1341
Implement strategic sourcing partnerships in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 1 Be able to agree and implement systems with partners | 1.1 Specify and agree with partners the ways in which systems will be managed and aligned 1.2 Identify and agree, with all stakeholders, the changes to systems which are necessary to meet technical and quality requirements 1.3 Develop and implement systems, identify any problems and make appropriate modifications 1.4 Negotiate and agree formal contractual arrangements that set out the requirements for the implementation and operation of strategic sourcing partnerships |
| 2 Understand how to agree and implement systems with partners | 2.1 Evaluate how to specify and agree with partners the ways in which systems will be managed and aligned 2.2 Describe how to identify and agree, with all stakeholders, the changes to systems which are necessary to meet technical and quality requirements 2.3 Propose how to develop and implement systems, identify any problems and make appropriate modifications 2.4 Propose how to negotiate and agree formal contractual arrangements that set out the requirements for the implementation and operation of strategic sourcing partnerships |
| 3 Be able to monitor and control arrangements for strategic sourcing | 3.1 Review the terms of contract regularly, and assess whether there are continued benefits to the partners 3.2 Monitor the performance of suppliers against agreed standards and quantify any variations in performance 3.3 Inform suppliers about variations in performance from contract terms, and provide them with advice and information about the changes needed and the time allowed to make the changes 3.4 Investigate persistent variations and major problems, identify likely causes and inform all those who are affected 3.5 Assess existing sourcing arrangements against alternative supply options regularly and estimate the relative benefits and advantages |
| 4 Understand how to monitor and control arrangements for strategic sourcing | 4.1 Examine how to review the terms of contract regularly, and assess whether there are continued benefits to the partners 4.2 Examine how to monitor the performance of suppliers against agreed standards and quantifying any variations in performance 4.3 Explain how to inform suppliers about variations in performance from contract terms, and provide them with advice and information about the changes needed and the time allowed to make the changes |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|---|
| | <p>4.4 Examine how to investigate persistent variations and major problems, identify likely causes and inform all those who are affected</p> <p>4.5 Examine how to assess existing sourcing arrangements against alternative supply options regularly and estimate the relative benefits and advantages</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit R/615/1342

Establish project procurement arrangements in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to select and agree procurement strategies | 1.1 Identify and agree feasible and realistic procurement objectives and criteria 1.2 Identify procurement methods which are capable of meeting the procurement objectives and evaluate them against selected criteria 1.3 Select and recommend the most effective procurement methods which meet stakeholder constraints and relevant legal and statutory requirements 1.4 Agree and record the selected procurement method and appropriate implementation procedures |
| 2 Understand how to select and agree procurement strategies | 2.1 Describe how to identify and agree feasible and realistic procurement objectives and criteria 2.2 Describe how to identify procurement methods which are capable of meeting the procurement objectives and evaluate them against selected criteria 2.3 Evaluate how to select and recommend the most effective procurement methods which meet stakeholder constraints and relevant legal and statutory requirements 2.4 Evaluate how to agree and record the selected procurement method and appropriate implementation procedures |
| 3 Be able to establish project team partnering | 3.1 Identify and confirm with the stakeholders, the type of project work and objectives for project team partnering 3.2 Form a selection panel of stakeholders to assess potential partners and identify selection criteria 3.3 Provide information to potential partners and invite them to submit a statement of their capabilities 3.4 Evaluate the potential partners use the selection criteria and agree the short-listed potential partners 3.5 Interview and hold discussions with the short-listed potential partners to assess their suitability and commitment to the project 3.6 Select and confirm the project partners with the stakeholders 3.7 Negotiate agreements and contracts with project partners 3.8 Conduct workshops for project partners to facilitate co-operative partnering and agree individual and mutual project objectives |
| 4 Understand how to establish project team partnering | 4.1 Describe how to identify and confirm with the stakeholders, the type of project work and objectives for project team partnering 4.2 Evaluate how to form a selection panel of stakeholders to assess potential partners and identify selection criteria 4.3 Explain how to provide information to potential partners and invite them to submit a statement of their capabilities |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| | <p>4.4 Evaluate the potential partners using the selection criteria and agree the short-listed potential partners</p> <p>4.5 Examine how to interview and hold discussions with the short-listed potential partners to assess their suitability and commitment to the project</p> <p>4.6 Evaluate how to select and confirm the project partners with the stakeholders</p> <p>4.7 Propose how to negotiate agreements and contracts with project partners</p> <p>4.8 Explain how to conduct workshops for project partners to facilitate co-operative partnering and agree individual and mutual project objectives</p> |
| 5 Be able to recommend and agree a form of contract | <p>5.1 Identify clearly the stakeholders and the purpose of the contract</p> <p>5.2 Identify with the stakeholders significant criteria for selecting the form of contract</p> <p>5.3 Select and recommend a form of contract which is appropriate to the type of project work</p> <p>5.4 Give clear and accurate information and advice and provide clients the opportunities to comment and ask for clarification</p> <p>5.5 Agree a form of contract which is capable of being put into effect</p> |
| 6 Understand how to recommend and agree a form of contract | <p>6.1 Describe how to identify clearly the stakeholders and the purpose of the contract</p> <p>6.2 Describe how to identify with the stakeholders significant criteria for selecting the form of contract</p> <p>6.3 Evaluate how to select and recommend a form of contract which is appropriate to the type of project work</p> <p>6.4 Explain how to give clear and accurate information and advice and provide clients the opportunities to comment and ask for clarification</p> <p>6.5 Evaluate how to agree a form of contract which is capable of being put into effect</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit Y/615/1343

Manage procurement processes in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| 1 Be able to evaluate potential tenderers | 1.1 Decide which potential tenderers could meet the contract specification to fulfil the selected type of procurement process 1.2 Decide how many tenderers to invite, taking into account the value and size of the contract 1.3 Send enquiries to potential tenderers, in accordance with regulatory requirements, and require them to provide evidence about their experience and capability 1.4 Choose selection criteria which are suitable to weight and rate performance for the type of work described in the tender 1.5 Evaluate potential tenderers who respond to the invitation against the selection criteria, place them in rank order and choose the number needed 1.6 Offer advice and information to decision makers about potential tenderers and the selection criteria and modify the tender list to reflect any changes which are agreed 1.7 Confirm that the selected tenderers are willing to tender 1.8 Add more potential tenderers from the evaluation list which meet the selection criteria if those contacted are not willing to tender |
| 2 Understand how to evaluate potential tenderers | 2.1 Evaluate how to decide which potential tenderers could meet the contract specification to fulfil the selected type of procurement process 2.2 Evaluate how to decide how many tenderers to invite, taking into account the value and size of the contract 2.3 Explain how to send enquiries to potential tenderers, in accordance with regulatory requirements, and require them to provide evidence about their experience and capability 2.4 Evaluate how to choose selection criteria which are suitable to weight and rate performance for the type of work described in the tender 2.5 Evaluate potential tenderers who respond to the invitation against the selection criteria, place them in rank order and choose the number needed 2.6 Propose how to offer advice and information to decision makers about potential tenderers and the selection criteria and modify the tender list to reflect any changes which are agreed 2.7 Explain how to confirm that the selected tenderers are willing to tender 2.8 Explain how to add more potential tenderers from the evaluation list which meet the selection criteria if those contacted are not willing to tender |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 3 Be able to obtain bids and tenders | <p>3.1 Ensure that procurement documents are drafted which meet statutory regulations, codes of practice and the organisation's policies</p> <p>3.2 Ensure that procurement documents are issued to all the tenderers on the agreed list, following the agreed procedures</p> <p>3.3 Respond to queries from tenderers promptly and pass on any additional information which they need</p> <p>3.4 Ensure that accurate records are kept of procurement documents issued, feedback, queries and information from tenderers</p> <p>3.5 Ensure that required action is implemented when tenderers withdraw from the process</p> |
| 4 Understand how to obtain bids and tenders | <p>4.1 Explain how to ensure that procurement documents are drafted which meet statutory regulations, codes of practice and the organisation's policies</p> <p>4.2 Explain how to ensure that procurement documents are issued to all the tenderers on the agreed list, following the agreed procedures</p> <p>4.3 Explain how to respond to queries from tenderers promptly and pass on any additional information which they need</p> <p>4.4 Explain how to ensure that accurate records are kept of procurement documents issued, feedback, queries and information from tenderers</p> <p>4.5 Explain how to ensure that required action is implemented when tenderers withdraw from the process</p> |
| 5 Be able to analyse and select successful bids and tenders and negotiate changes | <p>5.1 Ensure that the tenders received are stored in a secure place and open them on the closing date in line with the organisation's procedures and regulatory requirements</p> <p>5.2 Select for evaluation those tenders which meet the criteria and reject those that do not</p> <p>5.3 Check with tenderers if any discrepancies, omissions and errors are found in the tenders, and make any amendments to which tenderers agree</p> <p>5.4 Analyse the tenders which are selected against the agreed criteria and choose the tender which best meets the criteria</p> <p>5.5 Check that the successful tenderer and the client can meet the obligations of the contract and recommend a preferred tender to the client</p> <p>5.6 Negotiate and agree any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract</p> <p>5.7 Accept the successful tender formally and politely notify tenderers who have been unsuccessful, about the result</p> <p>5.8 Modify and repeat the procurement processes if too few tenders are received to show that there has been adequate competition</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| 6 Understand how to analyse and select successful bids and tenders and negotiate changes | <ul style="list-style-type: none">6.1 Explain how to ensure that the tenders received are stored in a secure place and open them on the closing date in line with the organisation's procedures and regulatory requirements6.2 Evaluate how to select for evaluation those tenders which meet the criteria and reject those that do not6.3 Explain how to check with tenderers if any discrepancies, omissions and errors are found in the tenders, and make any amendments to which tenderers agree6.4 Examine how to analyse the tenders which are selected against the agreed criteria and choose the tender which best meets the criteria6.5 Explain how to check that the successful tenderer and the client can meet the obligations of the contract and recommend a preferred tender to the client6.6 Propose how to negotiate and agree any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract6.7 Evaluate how to accept the successful tender formally and politely notify tenderers who have been unsuccessful, about the result6.8 Explain how to modify and repeat the procurement processes if too few tenders are received to show that there has been adequate competition |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit D/615/1344

Prepare and submit estimates, bids and tenders in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 1 Be able to evaluate estimate, bid and tender enquiry documentation | 1.1 Check the tender details and tender requirements and confirm them with decision makers 1.2 Summarise the tender requirements accurately and pass them on for comment to decision makers 1.3 Identify any points of concern in the tender documents and refer them to decision makers for them to clarify and resolve 1.4 Evaluate the tender documents against the agreed criteria and assess whether the organisation is capable of meeting the tender requirements and has enough resources to do so 1.5 Identify and assess any contractual and legal issues which might affect the project 1.6 Investigate the tender documents within budgets and tender time limits 1.7 Draw accurate conclusions about tender requirements within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid 1.8 Keep information about tender enquiries in confidence and only pass it on to people who have the authority to receive it |
| 2 Understand how to evaluate estimate, bid and tender enquiry documentation | 2.1 Explain how to check the tender details and tender requirements and confirm them with decision makers 2.2 Explain how to summarise the tender requirements accurately and pass them on for comment to decision makers 2.3 Describe how to identify any points of concern in the tender documents and refer them to decision makers for them to clarify and resolve 2.4 Evaluate the tender documents against the agreed criteria and assess whether the organisation is capable of meeting the tender requirements and has enough resources to do so 2.5 Describe how to identify and assess any contractual and legal issues which might affect the project 2.6 Examine how to investigate the tender documents within budgets and tender time limits 2.7 Evaluate how to draw accurate conclusions about tender requirements within the limits of the tender information which is available, and which provide an objective basis for making a decision on whether to make a bid |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | 2.8 Explain how to keep information about tender enquiries in confidence and only pass it on to people who have the authority to receive it |
| 3 Be able to assess the resource requirements and costs within an estimate, bid and tender | <p>3.1 Develop a proposed method statement and draft programme which meet the tender requirements</p> <p>3.2 Calculate, accurately, from available sources, what resources will be needed, investigate whether the resources will be available and present the information so that the requirements can be costed and planned</p> <p>3.3 Estimate resource costs by calculating an accurate cost for each item which is required</p> <p>3.4 Modify the cost to take into account any external factors which may affect the cost projections</p> <p>3.5 Produce the overall estimate of costs and check that it is complete, accurate and in a form which is suitable for a judgement to be made</p> <p>3.6 Explain and clarify the projected costs to support the calculations</p> <p>3.7 Recommend payment schedules which will meet known cash flow requirements</p> |
| 4 Understand how to assess the resource requirements and costs within an estimate, bid and tender | <p>4.1 Propose how to develop a proposed method statement and draft programme which meet the tender requirements</p> <p>4.2 Explain how to calculate, accurately, from available sources, what resources will be needed, investigate whether the resources will be available and present the information so that the requirements can be costed and planned</p> <p>4.3 Examine how to estimate resource costs by calculating an accurate cost for each item which is required</p> <p>4.4 Explain how to modify the cost to take into account any external factors which may affect the cost projections</p> <p>4.5 Explain how to produce the overall estimate of costs and check that it is complete, accurate and in a form which is suitable for a judgement to be made</p> <p>4.6 Explain and clarify the projected costs to support the calculations</p> <p>4.7 Propose how to recommend payment schedules which will meet known cash flow requirements</p> |
| 5 Be able to finalise and submit an estimate, bid and tender offer | <p>5.1 Identify and evaluate, realistically, the risks and opportunities involved in a successful tender offer</p> <p>5.2 Identify and specify any alternatives and qualifications to the original tender requirements which may improve the organisation's ability to carry out the work</p> <p>5.3 Apply a profit margin and payment schedule which meets the objectives and strategy of the organisation</p> <p>5.4 Check that the tender offer is complete and accurate and conforms to house style, and make any necessary modifications</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | <p>5.5 Present and support the tender offer in a manner which maximises its acceptability</p> <p>5.6 Collate, arrange and submit tender offer information in accordance with procurement requirements</p> <p>5.7 Collect together all the tender offer information, record it, store it securely and only pass it on to people who have the authority to receive it</p> |
| 6 Understand how to finalise and submit an estimate, bid and tender offer | <p>6.1 Describe how to identify and evaluate, realistically, the risks and opportunities involved in a successful tender offer</p> <p>6.2 Describe how to identify and specify any alternatives and qualifications to the original tender requirements which may improve the organisation's ability to carry out the work</p> <p>6.3 Explain how to apply a profit margin and payment schedule which meets the objectives and strategy of the organisation</p> <p>6.4 Explain how to check that the tender offer is complete and accurate and conforms to house style, and make any necessary modifications</p> <p>6.5 Explain how to present and support the tender offer in a manner which maximises its acceptability</p> <p>6.6 Explain how to collate, arrange and submit tender offer information in accordance with procurement requirements</p> <p>6.7 Explain how to collect together all the tender offer information, record it, store it securely and only pass it on to people who have the authority to receive it</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit H/615/1345

Ensure that contracts are prepared, negotiated and concluded in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to ensure that forms of contract are prepared | 1.1 Select forms of contract, contract clauses and documents for the form of procurement proposed 1.2 Ensure that standard forms of contract are amended so that the clauses and documents are suitable for the form of procurement proposed 1.3 Ensure that particulars and preliminaries are drafted which accurately describe the needs of all the stakeholders in the form of contract 1.4 Ensure that contract clauses are checked and that appendices and amendments meet statutory requirements 1.5 Ensure that non-standard forms of contract, clauses and documents are drafted, which have legal precedent, where standard forms of contract or modified standard forms are not suitable 1.6 Obtain legal advice on the implications of drafting non-standard clauses and forms of contract and explain why this is necessary to the stakeholders in the contract 1.7 Obtain necessary checks and approvals for the draft forms of contract |
| 2 Understand how to ensure that forms of contract are prepared | 2.1 Explain how to select forms of contract, contract clauses and documents for the form of procurement proposed 2.2 Explain how to ensure that standard forms of contract are amended so that the clauses and documents are suitable for the form of procurement proposed 2.3 Explain how to ensure that particulars and preliminaries are drafted which accurately describe the needs of all the stakeholders in the form of contract 2.4 Explain how to ensure that contract clauses are checked and that appendices and amendments meet statutory requirements 2.5 Explain how to ensure that non-standard forms of contract, clauses and documents are drafted, which have legal precedent, where standard forms of contract or modified standard forms are not suitable 2.6 Explain how to obtain legal advice on the implications of drafting non-standard clauses and forms of contract and explain why this is necessary to the stakeholders in the contract 2.7 Explain how to obtain necessary checks and approvals for the draft forms of contract |
| 3 Be able to ensure that the contract is negotiated and concluded | 3.1 Ensure that the obligations of the parties to the contract are identified and obtain valid, written proof that they are able to meet the obligations 3.2 Negotiate contracts use a style and manner which maintains good long term relationships with all the stakeholders |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| | <p>3.3 Negotiate and agree optimum contract terms, conditions and amendments</p> <p>3.4 Record the results of negotiations accurately and pass the information on, promptly and in accordance with legal requirements, to all the stakeholders</p> <p>3.5 Ensure that accurate copies of the final contract documents are prepared and checked to meet legal requirements and arrange for them to be signed</p> |
| 4 Understand how to ensure that the contract is negotiated and concluded | <p>4.1 Explain how to ensure that the obligations of the parties to the contract are identified and obtain valid, written proof that they are able to meet the obligations</p> <p>4.2 Propose how to negotiate contracts use a style and manner which maintains good long term relationships with all the stakeholders</p> <p>4.3 Propose how to negotiate and agree optimum contract terms, conditions and amendments</p> <p>4.4 Explain how to record the results of negotiations accurately and pass the information on, promptly and in accordance with legal requirements, to all the stakeholders</p> <p>4.5 Explain how to ensure that accurate copies of the final contract documents are prepared and checked to meet legal requirements and arrange for them to be signed</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit K/615/1346

Control organisational and project income and expenditure in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to allocate organisational budgets | 1.1 Identify responsibilities for budgetary control and allocations under the budget headings of financial plans 1.2 Identify an appropriate method of maintaining overall control of the budget, produce guidance documents and circulate the information to those responsible 1.3 Identify appropriate methods for presenting, in a suitable format, financial information to responsible personnel 1.4 Issue allocations under budget headings, cash flow calculations and report requirements to those with financial responsibilities 1.5 Authorise expenditure and changes to budgets and issue the information to those responsible 1.6 Identify and agree appropriate methods and timescales for reporting contingencies and variances 1.7 Resolve queries and discrepancies over allocated budgets |
| 2 Understand how to allocate organisational budgets | 2.1 Describe how to identify responsibilities for budgetary control and allocations under the budget headings of financial plans 2.2 Describe how to identify an appropriate method of maintaining overall control of the budget, produce guidance documents and circulate the information to those responsible 2.3 Describe how to identify appropriate methods for presenting, in a suitable format, financial information to responsible personnel 2.4 Explain how to issue allocations under budget heads, cash flow calculations and report requirements to those with financial responsibilities 2.5 Evaluate how to authorise expenditure and changes to budgets and issue the information to those responsible 2.6 Describe how to identify and agree appropriate methods and timescales for reporting contingencies and variances 2.7 Propose how to resolve queries and discrepancies over allocated budgets |
| 3 Be able to prepare and agree reimbursement for loss and expense | 3.1 Assess the basis of claims and criteria for recovery against the contract and relevant expert opinion, and progress and structure valid claims which can be substantiated 3.2 Calculate claims accurately from relevant and verified information sources 3.3 Identify the liability for the cost and inform the people involved in the contract 3.4 Analyse the opposing grounds for the claims, structure the claims clearly and present them |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| 4 Understand how to prepare and agree reimbursement for loss and expense | 3.5 Negotiate and agree amendments to the claim with the people involved in the contract |
| | 3.6 Conduct negotiations with the people involved in the contract in a professional manner |
| | 3.7 Record documents, back-up information and calculations accurately, reference them clearly and store them so that they can be easily referred to for audit and reference |
| | 4.1 Examine how to assess the basis of claims and criteria for recovery against the contract and relevant expert opinion, and progress and structure valid claims which can be substantiated |
| | 4.2 Explain how to calculate claims accurately from relevant and verified information sources |
| | 4.3 Describe how to identify the liability for the cost and inform the people involved in the contract |
| | 4.4 Examine how to analyse the opposing grounds for the claims, structure the claims clearly and present them |
| | 4.5 Propose how to negotiate and agree amendments to the claim with the people involved in the contract |
| | 4.6 Propose how to conduct negotiations with the people involved in the contract in a professional manner |
| | 4.7 Explain how to record documents, back-up information and calculations accurately, reference them clearly and store them so that they can be easily referred to for audit and reference |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit M/615/1347

Manage project risks and opportunities in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 1 Be able to assess and manage project risks and opportunities | 1.1 Identify and review project information and processes relating to risks and opportunities 1.2 Identify and assess the significance and ownership of the risks and opportunities 1.3 Select the most effective risk management methods and procedures to manage residual risks that comply with all relevant regulations and guidelines 1.4 Identify the activities and resources required to implement the risk management methods 1.5 Specify clearly the procedures for implement the risk management methods and procedures 1.6 Implement and maintain the risk management methods and procedures and modify them to meet changed circumstances |
| 2 Understand how to assess and manage project risks and opportunities | 2.1 Describe how to identify and review project information and processes relating to risks and opportunities 2.2 Describe how to identify and assess the significance and ownership of the risks and opportunities 2.3 Evaluate how to select the most effective risk management methods and procedures to manage residual risks that comply with all relevant regulations and guidelines 2.4 Describe how to identify the activities and resources required to implement the risk management methods 2.5 Evaluate how to specify clearly the procedures for implement the risk management methods and procedures 2.6 Explain how to implement and maintain the risk management methods and procedures and modify them to meet changed circumstances |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit T/615/1348

Manage project processes in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| 1 Be able to develop and maintain systems for manage health, safety and welfare | 1.1 Encourage a culture of health, safety and welfare on the project and identify and recommend opportunities for improving the health and safety of the work environment 1.2 Develop and maintain adequate health, safety and welfare policies and systems which meet organisational and statutory requirements 1.3 Allocate health, safety and welfare responsibilities, equipment and resources to people which are consistent with organisational and statutory requirements, and the specific project requirements 1.4 Develop and implement systems which meet statutory requirements for identifying and reducing hazards and report accidents and emergencies and preventing recurrence 1.5 Ensure that health, safety and welfare systems are checked regularly, in accordance with organisational and statutory requirements, and identify and record any special site conditions and situations which do not comply with regulations |
| 2 Understand how to develop and maintain systems for manage health, safety and welfare | 2.1 Explain how to encourage a culture of health, safety and welfare on the project and identify and recommend opportunities for improving the health and safety of the work environment 2.2 Propose how to develop and maintain adequate health, safety and welfare policies and systems which meet organisational and statutory requirements 2.3 Explain how to allocate health, safety and welfare responsibilities, equipment and resources to people which are consistent with organisational and statutory requirements, and the specific project requirements 2.4 Propose how to develop and implement systems which meet statutory requirements for identifying and reducing hazards and reporting accidents and emergencies and preventing recurrence 2.5 Explain how to ensure that health, safety and welfare systems are checked regularly, in accordance with organisational and statutory requirements, and identify and record any special site conditions and situations which do not comply with regulations |
| 3 Be able to establish and manage project team activities | 3.1 Prepare a strategy for the project which makes the best use of the capabilities of all project team members 3.2 Examine stakeholder needs and intentions from the brief, discuss them with stakeholders, clarify them and resolve any issues 3.3 Develop clear parameters which will enable the project to meet the requirements of the brief and schedules |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| | <p>3.4 Set up arrangements to achieve effective communication and trust between stakeholders</p> <p>3.5 Set up and agree, with the project team members, appropriate and realistic methods for project development, evaluation, modification, monitoring and updating</p> <p>3.6 Identify potential areas needing investigation and agree a realistic timescale and costs with the project team</p> <p>3.7 Motivate, coach and involve project team members to maximise and integrate their contributions to the project development</p> <p>3.8 Monitor the progress of the project team and provide project team members with feedback on timing, task completion and team processes</p> <p>3.9 Coordinate feedback sessions in a manner which is suitable for the needs and capabilities of the project team and which allows each team member enough time to express their views</p> |
| 4 Understand how to establish and manage project team activities | <p>4.1 Propose how to prepare a strategy for the project which makes the best use of the capabilities of all project team members</p> <p>4.2 Examine stakeholder needs and intentions from the brief, discuss them with stakeholders, clarify them and resolve any issues</p> <p>4.3 Propose how to develop clear parameters which will enable the project to meet the requirements of the brief and schedules</p> <p>4.4 Propose how to set up arrangements to achieve effective communication and trust between stakeholders</p> <p>4.5 Propose how to set up and agree, with the project team members, appropriate and realistic methods for project development, evaluation, modification, monitoring and updating</p> <p>4.6 Describe how to identify potential areas needing investigation and agree a realistic timescale and costs with the project team</p> <p>4.7 Explain how to motivate, coach and involve project team members to maximise and integrate their contributions to the project development</p> <p>4.8 Examine how to monitor the progress of the project team and provide project team members with feedback on timing, task completion and team processes</p> <p>4.9 Explain how to coordinate feedback sessions in a manner which is suitable for the needs and capabilities of the project team and which allows each team member enough time to express their views</p> |
| 5 Be able to implement project organisation and communication systems | <p>5.1 Identify the organisational and communication needs for the project</p> <p>5.2 Implement systems which are compatible with those used by the client and supply chain and which enable clear and</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | <p>effective management, and administrative and operational controls</p> <p>5.3 Produce information about people's roles and responsibilities, the project, and the organisational structure, and circulate the information to stakeholders</p> <p>5.4 Introduce methods of communicating, reporting, recording and retrieving information between stakeholders which are appropriate to the needs of the project and monitor the methods regularly for effectiveness</p> <p>5.5 Identify and investigate breakdowns in communication, and take action to restore effective communication</p> <p>5.6 Set up systems for recording and providing feedback on the ways in which resources are allocated and used</p> <p>5.7 Audit health, safety and welfare systems regularly, in accordance with organisational and statutory requirements, and identify and record any special site conditions and situations which do not comply with regulations</p> |
| <p>6 Understand how to implement project organisation and communication systems</p> | <p>6.1 Describe how to identify the organisational and communication needs for the project</p> <p>6.2 Explain how to implement systems which are compatible with those used by the client and supply chain and which enable clear and effective management, and administrative and operational controls</p> <p>6.3 Explain how to produce information about people's roles and responsibilities, the project, and the organisational structure, and circulate the information to stakeholders</p> <p>6.4 Propose how to introduce methods of communicating, reporting, recording and retrieving information between stakeholders which are appropriate to the needs of the project and monitor the methods regularly for effectiveness</p> <p>6.5 Describe how to identify and investigate breakdowns in communication, and take action to restore effective communication</p> <p>6.6 Propose how to set up systems for recording and providing feedback on the ways in which resources are allocated and used</p> <p>6.7 Examine how to audit health, safety and welfare systems regularly, in accordance with organisational and statutory requirements, and identify and record any special site conditions and situations which do not comply with regulations</p> |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit A/615/1349

Manage project evaluation and feedback in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| 1 Be able to obtain and evaluate project feedback information and make improvements | 1.1 Promote the value of making improvements from feedback and encourage all those involved in the project to cooperate and obtain feedback information 1.2 Identify and agree the areas to focus on for making improvements from feedback 1.3 Identify and agree valid and reliable methods and sources for obtaining feedback information on projects and for assessing and recommending improvements from feedback 1.4 Obtain, investigate and assess feedback information from all relevant methods and sources 1.5 Review the feedback information, match it against the original requirements and objectives and summarise both positive and negative factors 1.6 Recommend improvements from feedback received and justify the recommendations to decision makers 1.7 Classify improvements from feedback which have been agreed and incorporate the improvements accurately into updated procedures and databases 1.8 Summarise changes and improvements from feedback which have been agreed and promote them for adoption and use |
| 2 Understand how to obtain and evaluate project feedback information and make improvements | 2.1 Propose how to promote the value of making improvements from feedback and encourage all those involved in the project to cooperate and obtain feedback information 2.2 Describe how to identify and agree the areas to focus on for making improvements from feedback 2.3 Describe how to identify and agree valid and reliable methods and sources for obtaining feedback information on projects and for assessing and recommending improvements from feedback 2.4 Explain how to obtain, investigate and assess feedback information from all relevant methods and sources 2.5 Examine how to review the feedback information, match it against the original requirements and objectives and summarise both positive and negative factors 2.6 Propose how to recommend improvements from feedback received and justify the recommendations to decision makers 2.7 Explain how to classify improvements from feedback which have been agreed and incorporate the improvements accurately into updated procedures and databases |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|--|
| | 2.8 Explain how to summarise changes and improvements from feedback which have been agreed and promote them for adoption and use |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit A/615/1383
Control project outcomes in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| 1 Be able to control projects against quality standards | 1.1 Identify and interpret quality standards from available information and pass them to the project team for their implementation, before they start work 1.2 Set up systems for inspecting, controlling and recording the quality of work against specified quality standards 1.3 Require unacceptable quality standards to be corrected and notify the project team if this is not done within a reasonable time 1.4 Inform the project team regularly about significant variations in quality standards, programme and safety implications, and suggest the decisions which they need to make and actions they need to take 1.5 Identify improvements from feedback received and recommend them to the project team and agree amendments to the contract quality requirements and specifications and record them |
| 2 Understand how to control projects against quality standards | 2.1 Describe how to identify and interpret quality standards from available information and pass them to the project team for their implementation, before they start work 2.2 Propose how to set up systems for inspecting, controlling and recording the quality of work against specified quality standards 2.3 Describe how to require unacceptable quality standards to be corrected and notify the project team if this is not done within a reasonable time 2.4 Explain how to inform the project team regularly about significant variations in quality standards, programme and safety implications, and suggest the decisions which they need to make and actions they need to take 2.5 Describe how to identify improvements from feedback received and recommend them to the project team and agree amendments to the contract quality requirements and specifications and record them |
| 3 Be able to ensure project compliance with legal and statutory requirements | 3.1 Identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty 3.2 Ensure that required legal and statutory consents are obtained 3.3 Brief the project team about their legal and statutory responsibilities to those responsible for implement them before they start work on the contract 3.4 Develop and implement monitoring systems, collect information regularly and summarise it |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | <p>3.5 Identify situations which do not comply with legal and statutory requirements, investigate the circumstances thoroughly and take appropriate corrective action</p> <p>3.6 Identify any changes in legal and statutory requirements which may have an impact on the project, summarise the important details and pass this on to the project team</p> <p>3.7 Complete statutory submissions accurately and on time</p> |
| 4 Understand how to ensure project compliance with legal and statutory requirements | <p>4.1 Describe how to identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty</p> <p>4.2 Explain how to ensure that required legal and statutory consents are obtained</p> <p>4.3 Explain how to brief the project team about their legal and statutory responsibilities to those responsible for implement them before they start work on the contract</p> <p>4.4 Propose how to develop and implement monitoring systems, collect information regularly and summarise it</p> <p>4.5 Describe how to identify situations which do not comply with legal and statutory requirements, investigate the circumstances thoroughly and take appropriate corrective action</p> <p>4.6 Describe how to identify any changes in legal and statutory requirements which may have an impact on the project, summarise the important details and pass this on to the project team</p> <p>4.7 Explain how to complete statutory submissions accurately and on time</p> |
| 5 Be able to control project progress against agreed programme | <p>5.1 Develop and implement systems to monitor and record information on the progress of the project against the agreed programme</p> <p>5.2 Collect information regularly and summarise it accurately</p> <p>5.3 Identify inadequately and inappropriately specified resources, inform project team and specify and obtain alternative resources</p> <p>5.4 Ensure that any deviations are identified and quantified from planned progress which have occurred, or which may occur, and which could affect the programme</p> <p>5.5 Investigate the circumstances of any deviations thoroughly and agree and implement appropriate corrective action</p> <p>5.6 Recommend options which are most likely to minimise increases in time and help the project progress, and pass these on to the project team</p> <p>5.7 Regularly inform the project team and stakeholders about progress, changes to the programme, resource needs, and suggest the decisions and actions that need to be taken</p> <p>5.8 Identify improvements from feedback received and recommend them to project team and stakeholders</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 6 Understand how to control project progress against agreed programme | <p>6.1 Propose how to develop and implement systems to monitor and record information on the progress of the project against the agreed programme</p> <p>6.2 Explain how to collect information regularly and summarise it accurately</p> <p>6.3 Describe how to identify inadequately and inappropriately specified resources, inform project team and specify and obtain alternative resources</p> <p>6.4 Explain how to ensure that any deviations are identified and quantified from planned progress which have occurred, or which may occur, and which could affect the programme</p> <p>6.5 Examine how to investigate the circumstances of any deviations thoroughly and agree and implement appropriate corrective action</p> <p>6.6 Propose how to recommend options which are most likely to minimise increases in time and help the project progress, and pass these on to the project team</p> <p>6.7 Explain how to regularly inform the project team and stakeholders about progress, changes to the programme, resource needs, and suggest the decisions and actions that need to be taken</p> <p>6.8 Describe how to identify improvements from feedback received and recommend them to project team and stakeholders</p> |
| 7 Be able to control project value and costs | <p>7.1 Ensure that appropriate project cost control systems are developed and implemented which are able to provide early warning of problems</p> <p>7.2 Ensure that value and cost data is collected regularly, recorded correctly and passed on to the people who need it in time for them to be able to use it</p> <p>7.3 Ensure that the correct work value and cost data are calculated from measurement of work quantity and payment rates</p> <p>7.4 Ensure that accurate value and cost data is prepared and present it in a format which will help people to make decisions</p> <p>7.5 Ensure that variations and trends in value and cost data are identified and quantify and cost them</p> <p>7.6 Ensure that any variations are investigated thoroughly and appropriate corrective action is agreed and implemented with the project team which will restore costs and expenditure to budget</p> <p>7.7 Ensure that systems and processes are developed and implemented for identifying opportunities for cost savings and recommend them to the project team</p> <p>7.8 Ensure that realistic opportunities for cost savings are identified and costed correctly and recommend them to the project team</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|---|
| 8 Understand how to control project value and costs | <ul style="list-style-type: none">8.1 Explain how to ensure that appropriate project cost control systems are developed and implemented which are able to provide early warning of problems8.2 Explain how to ensure that value and cost data is collected regularly, recorded correctly and passed on to the people who need it in time for them to be able to use it8.3 Explain how to ensure that the correct work value and cost data are calculated from measurement of work quantity and payment rates8.4 Explain how to ensure that accurate value and cost data is prepared and present it in a format which will help people to make decisions8.5 Explain how to ensure that variations and trends in value and cost data are identified and quantify and cost them8.6 Explain how to ensure that any variations are investigated thoroughly and appropriate corrective action is agreed and implemented with the project team which will restore costs and expenditure to budget8.7 Explain how to ensure that systems and processes are developed and implemented for identifying opportunities for cost savings and recommend them to the project team8.8 Explain how to ensure that realistic opportunities for cost savings are identified and costed correctly and recommend them to the project team |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit M/615/1350

Evaluate and progress the resolution of disputes in construction management

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|---|
| 1 Be able to evaluate potential implications for the resolution of disputes | 1.1 Summarise the type and nature of the dispute and its legal context 1.2 Assess the strengths and weaknesses of the case and make a judgement about the potential outcomes 1.3 Evaluate all the information which is relevant to the dispute, identify information which will support the case and summarise and justify it in a reasoned argument 1.4 Identify what expertise and support will be needed at different stages of the dispute 1.5 Consult with experts, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required 1.6 Assess the arguments and the advice received from experts, produce justifiable conclusions and recommendations for further action and pass these to the people involved in the dispute 1.7 Assess the implications of proceeding with the case 1.8 Identify potential options for settling the dispute which are based on relevant information and accurate assessments 1.9 Identify potential responses to the options for settling the dispute and assess the risk involved 1.10 Recommend a process for settling the dispute which is likely to be most acceptable to all the people involved and which meets legal requirements 1.11 Specify, clearly, the process for settling the dispute which has been agreed and prepare written terms and conditions 1.12 Advise against proceeding where the dispute is neither valid nor credible, and offer realistic advice on alternative approaches |
| 2 Understand how to evaluate potential implications for the resolution of disputes | 2.1 Explain how to summarise the type and nature of the dispute and its legal context 2.2 Examine how to assess the strengths and weaknesses of the case and make a judgement about the potential outcomes 2.3 Evaluate all the information which is relevant to the dispute, identify information which will support the case and summarise and justify it in a reasoned argument 2.4 Describe how to identify what expertise and support will be needed at different stages of the dispute 2.5 Explain how to consult with experts, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required 2.6 Examine how to assess the arguments and the advice received from experts, produce justifiable conclusions and |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| | <p>recommendations for further action and pass these to the people involved in the dispute</p> <p>2.7 Examine how to assess the implications of proceeding with the case</p> <p>2.8 Describe how to identify potential options for settling the dispute which are based on relevant information and accurate assessments</p> <p>2.9 Describe how to identify potential responses to the options for settling the dispute and assess the risk involved</p> <p>2.10 Propose how to recommend a process for settling the dispute which is likely to be most acceptable to all the people involved and which meets legal requirements</p> <p>2.11 Evaluate how to specify, clearly, the process for settling the dispute which has been agreed and prepare written terms and conditions</p> <p>2.12 Propose how to advise against proceed where the dispute is neither valid nor credible, and offer realistic advice on alternative approaches</p> |
| 3 Be able to negotiate and progress the resolution of disputes | <p>3.1 Prepare documents about the dispute which have a clear rationale, and which include valid supporting information</p> <p>3.2 Keep regular contact with the people involved in the dispute and investigate and propose options and processes for settling the dispute, which are likely to be acceptable to them</p> <p>3.3 Review reactions and proposals from opposite parties and recommend a response</p> <p>3.4 Ask questions to test the consistency and resilience of the opposite partys position and to probe for possible movement</p> <p>3.5 Summarise and record points of agreement and disagreement</p> <p>3.6 Recommend acceptance of offers which are judged to be the best available</p> <p>3.7 Draft formal acceptance letters accurately and in a suitable style, and send them promptly to all parties</p> <p>3.8 Suggest realistic options and processes for settling the dispute when offers are not acceptable and assess the advantages and disadvantages of each alternative</p> |
| 4 Understand how to negotiate and progress the resolution of disputes | <p>4.1 Explain how to prepare documents about the dispute which have a clear rationale, and which include valid supporting information</p> <p>4.2 Explain how to keep regular contact with the people involved in the dispute and investigate and propose options and processes for settling the dispute, which are likely to be acceptable to them</p> <p>4.3 Examine how to review reactions and proposals from opposite parties and recommend a response</p> <p>4.4 Explain how to ask questions to test the consistency and resilience of the opposite partys position and to probe for possible movement</p> |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--------------------------------------|--|
| | <ul style="list-style-type: none">4.5 Explain how to summarise and record points of agreement and disagreement4.6 Propose how to recommend acceptance of offers which are judged to be the best available4.7 Explain how to draft formal acceptance letters accurately and in a suitable style, and send them promptly to all parties4.8 Propose how to suggest realistic options and processes for settling the dispute when offers are not acceptable and assess the advantages and disadvantages of each alternative |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.

Unit T/615/1351
Manage project completion in construction

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|--|--|
| 1 Be able to prepare information for project handover | 1.1 Specify what information and guidance will be needed by the people who will use the works and installations 1.2 Record the most recent information produced during design, construction and installation, which can be used for guidance about operation and maintenance 1.3 Prepare documentation on operation and maintenance which is logically structured, in a durable format and capable of interpretation by an informed lay user 1.4 Prepare information in the guidance which helps the client and users to identify limitations and to operate and maintain equipment, systems and services efficiently and without risk to health and safety |
| 2 Understand how to prepare information for project handover | 2.1 Evaluate how to specify what information and guidance will be needed by the people who will use the works and installations 2.2 Explain how to record the most recent information produced during design, construction and installation, which can be used for guidance about operation and maintenance 2.3 Explain how to prepare documentation on operation and maintenance which is logically structured, in a durable format and capable of interpretation by an informed lay user 2.4 Explain how to prepare information in the guidance which helps the client and users to identify limitations and to operate and maintain equipment, systems and services efficiently and without risk to health and safety |
| 3 Be able to manage project handover | 3.1 Confirm project requirements, consult with stakeholders and develop and agree a commissioning programme 3.2 Check that project requirements have been met and record outstanding work and defects 3.3 Carry out commissioning inspections and tests that require certification and ensure that they are witnessed by stakeholders as required 3.4 Identify and arrange for the satisfactory completion of any outstanding work 3.5 Arrange a handover inspection involve all relevant stakeholders, confirm any stakeholder concerns that need to be addressed, and record and agree any required actions 3.6 Check that stakeholders' respective responsibilities are adopted 3.7 Assemble and hand over information and documentation in accordance with the contract 3.8 Hand over equipment and services, demonstrate to and training of clients and users to operate them efficiently and safely |

Units – Learning Outcomes and Assessment Criteria

| Learning Outcome - The learner will: | Assessment Criterion - The learner can: |
|---|--|
| 4 Understand how to manage project handover | <ul style="list-style-type: none">4.1 Explain how to confirm project requirements, consult with stakeholders and develop and agree a commissioning programme4.2 Explain how to check that project requirements have been met and record outstanding work and defects4.3 Explain how to carry out commissioning inspections and tests that require certification and ensure that they are witnessed by stakeholders as required4.4 Describe how to identify and arrange for the satisfactory completion of any outstanding work4.5 Explain how to arrange a handover inspection involving all relevant stakeholders, confirm any stakeholder concerns that need to be addressed, and record and agree any required actions4.6 Explain how to check that stakeholders' respective responsibilities are adopted4.7 Explain how to assemble and hand over information and documentation in accordance with the contract4.8 Explain how to hand over equipment and services, demonstrate to and train clients and users to operate them efficiently and safely |

Assessment

There must be workplace evidence against each assessment criteria. Where the workplace evidence does not cover a whole range, knowledge evidence must be provided to cover the remaining items of range for each relevant assessment criteria.



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