

# Unit 35: Prepare Landscape and Garden Design Briefs

<b>Unit code:</b>	<b>D/600/9883</b>
<b>QCF Level 3:</b>	<b>BTEC National</b>
<b>Credit value:</b>	<b>10</b>
<b>Guided learning hours:</b>	<b>60</b>

## ● Aim and purpose

This unit aims to provide learners with an understanding of how to prepare landscape and garden design briefs and how these can be applied in practice. This unit is primarily aimed at learners within a centre-based setting looking to progress into the sector or further education and training.

## ● Unit introduction

The landscape sector is a major employer within the horticultural industry. Employees need to have a range of skills including the ability to communicate in a professional manner with a client and proficiency in analysis and evaluation.

This unit focuses on developing the skills and knowledge required for professional consultation and the production of design service documentation, establishing a clear contractual agreement between client and contractor. The unit will also cover skills and techniques involved in site analyses and evaluation to establish clear potentials for further design proposals.

On completion of this unit learners will be able to prepare and carry out client briefs, and communicate in a clear, ordered and professional manner. Learners will also be able to undertake a detailed and structured site analysis to establish an in-depth understanding of the landscape and its associated site problems.

## ● Learning outcomes

**On completion of this unit a learner should:**

- 1 Be able to present a fee bid and form of agreement to meet a client's requirements
- 2 Understand procedures to produce a fee bid and form of agreement
- 3 Be able to undertake site evaluation and analysis
- 4 Understand site evaluation
- 5 Understand landscape and garden site problems.

# Unit content

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## 1 Be able to present a fee bid and form of agreement to meet a client's requirements

*Key documents:* questionnaire to identify eg specific materials, personal preferences, chosen plants, budget; site summary checklist to list eg site features, climatic and topographical features, gradient, soil and drainage analysis, legal issues; brief and letter of engagement to identify eg client details, work to be carried out, deadlines, costs/charges, any other contractual details; design service contract to detail eg details of parties involved, description of work to be carried out, permissions, fees, payment details, dates, deadlines, insurance details, actions in case of dispute, date, signatures

## 2 Understand procedures to produce a fee bid and form of agreement

*Procedures:* actions and documentation required to form a landscape design and build contract; documents to aid process of producing a fee bid and form of agreement (including promotional company leaflets, presentational styles); undertaking and collating a design brief; documentation required to undertake a design service, questionnaire and site summary checklist, client brief and letter of engagement, design service contract and arrangement for work; garden designers fee bid (purpose, components); garden design contract (main components, arrangements for work, contractual conditions); understanding and adhering to relevant legislation concerning articles of agreement

## 3 Be able to undertake a site evaluation and analysis

*Techniques:* required to carry out an audit of a garden/landscape, site evaluation and analysis, presenting gathered data in a structured order; gathering site information, preparing a site analysis, survey and a list of horticultural potential from a real site

*Site characteristics evaluated:* physical, biological, cultural, environmental, edaphic eg topography, aspect, wildlife, site, pollution, climate, microclimate, soil and drainage analysis

*Site problems:* failure of hard and soft landscaping eg damage caused by tree roots, dimension error

## 4 Understand site evaluation

*Skills of collation and analysis:* using site data to identify potential landscape problems and opportunities for a design solution; undertaking site surveys, producing base plans, elevations, cross-sections or illustrations to communicate a sense of size and scale; producing functional plans to illustrate site-specific issues

*Field based methods:* methods and techniques to measure eg topography, aspect, wildlife, site, pollution, climate, microclimate, soil and drainage analysis

*Research of characteristics:* methods to research aesthetic, urban, rural, site and land classification eg boundaries, rights of way, different land uses, local by-laws, issues of land ownership

*Environmental Impact Assessment:* purpose; consultation and assessment of natural, social and economic assessment to explore consequence of proposed work

## 5 Understand landscape and garden site problems

*Causes of failure:* natural and managed causes of failure eg foundation movement, inappropriate choice of materials, extreme environmental conditions, escalating costs, soil and drainage issues, pollution, vandalism, overuse

*Aesthetic problems:* eg unpleasant perspective, land uses, colour, shape, scale, proportion, texture, form, space, balance, movement; failure to meet client specification

## Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
<b>P1</b> prepare a questionnaire and site summary checklist to use on site visits	<b>M1</b> undertake a client interview to establish client needs and design contract	<b>D1</b> undertake in depth client research to establish most client needs and determine the requirements of a design contract in a professional and well-structured manner
<b>P2</b> produce a brief and letter of engagement		
<b>P3</b> produce a design service contract, including arrangements for work		
<b>P4</b> review the range of techniques used to determine clients' requirements		
<b>P5</b> explain the purpose and components of a garden designer's fee bid		
<b>P6</b> explain the main components of a garden design contract, including arrangements for work and contractual conditions		
<b>P7</b> evaluate documentation used to aid the process of producing a fee bid and form of agreement, including promotional company leaflets and presentation styles		
<b>P8</b> interpret the physical, biological, cultural, environmental and edaphic characteristics of a site		

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
<b>P9</b> produce site evaluation and analysis reports, including graphic and written formats	<b>M2</b> produce detailed site evaluation and analysis reports using a range of data	<b>D2</b> present design recommendations, which are sympathetic to aesthetic, urban, rural, site and land characteristics, based on information interpreted from the client, site evaluation and analysis data.
<b>P10</b> report on landscape and garden site problems	<b>M3</b> make design recommendations based on information interpreted from site evaluation and analysis data	
<b>P11</b> explain field-based methods of measuring and recording site characteristics	<b>M4</b> discuss site characteristics from evaluation carried out.	
<b>P12</b> explain how to research aesthetic, urban, rural, site and land classification characteristics		
<b>P13</b> explain the purpose and procedure for an environmental impact assessment		
<b>P14</b> describe the causes of failure in hard and soft landscape features		
<b>P15</b> evaluate the causes of aesthetic problems and a range of possible solutions		
<b>P16</b> evaluate the causes of site based environmental problems and a range of possible solutions.		

**PLTS:** This summary references where applicable in the pass criteria, in the square brackets, the elements of the personal, learning and thinking skills. It identifies opportunities for learners to demonstrate effective application of the referenced elements of the skills.

Key	IE – independent enquirers	RL – reflective learners	SM – self-managers
	CT – creative thinkers	TW – team workers	EP – effective participators

# Essential guidance for tutors

## Delivery

Delivery of this unit will involve practical assessments, written assessment, visits to suitable collections and can link to work experience placements.

Tutors are encouraged to use a wide range of techniques in delivering this unit, lectures, discussions, site visits and supervised landscape case studies should all be used to stimulate and educate learners. Learners would also be expected to carry out independent study, use the internet and/or library-based research, and reflect on industry experience.

Learners must have the opportunity to undertake a site survey and client consultation, individually or as part of a small design team. At all times it is essential that tutors stress the importance of communication and presentation techniques, personal management and the need to undertake tasks in a professional manner.

Health and safety issues relating to accessing the landscape site or garden must be stressed and reinforced regularly. Tutors should consider integrating the delivery, private study and assessment for this unit with other relevant design units learners are taking as part of their programme of study.

## Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan gives **an indication of the volume of learning it would take the average learner** to achieve the learning outcomes. It is **indicative and is one way of achieving the credit value**.

Learning time should address all learning (including assessment) relevant to the learning outcomes, regardless of where, when and how the learning has taken place.

Topic and suggested assignments/activities and/assessment
<b>Assignment 1: The Design Service Package</b> (P1, P2, P3, P4, P5, P6, P7, M1, D1)
Introduction to assignment.
Theory session: introduction to the range of design service documentation, its role and function; lectures and group discussion.
Assessment 1 activity: production of design service package including client questionnaire and supporting contract documentation with supporting explanation and evaluations of each document.
<b>Assignment 2: The Site Analysis and Evaluation</b> (P8, P9, P10, M2, M3, D2)
Introduction to assignment.
Practical activity 1: undertake site analysis.
Practical activity 2: undertake client brief exercise.
Analysis and reflection.
Production of site analysis report.
<b>Assignment 3: Aspects of Analysis</b> (P11, P12, P13, P14, P15, P16, M4)
Introduction to assignment.
Theory session – aspects of analysis, visual impact assessment and land classification.
Practical activity 3: Site survey.
Theory session: production of site plan.

## Topic and suggested assignments/activities and/assessment

Producing site plan and illustrations.

Learner research, reflection and evaluation of constructional techniques.

Learners produce a report.

Unit review.

## Assessment

For P1, P2 and P3, learners need to produce key documentation for a fee bid and form of agreement. Learners must produce a questionnaire, brief and letter of engagement and design service contract suitable for use with a given client. This could be as part of a design project or case study.

For P4, P5, P6 and P7, learners must provide information on procedures to produce a fee bid and form of agreement. Evidence could be provided as part of a design project or case study.

P8 requires learners to collate and interpret the findings of the site analysis and site survey. This may take the form of a working base plan with annotated notes or a supporting technical report. The information may be gathered during the assessment of the other pass criteria to form a cohesive package of investigation, evaluation and reporting.

For P9, learners should carry out a site analysis and produce a report for a selected landscape or garden location showing key components and recording characteristics of the site. Tutors should identify the landscape or garden location or agree it through discussion with learners. Where possible, to ensure assessment is fair the size and complexity of the tasks should be the same for all learners.

P10 could be based on the findings of P9 where learners report on landscape problems concerning redevelopment or redesign of the site.

P11, P12, P13, P14, P15 and P16 require learners to provide information on the field-based methods of measuring and recording site characteristics they have carried out, as well as potential landscape and garden problems. Evidence could be linked to a design project created for other assessment criteria.

For M1, learners must undertake a client interview, using prepared documentation, to ascertain client needs and determine the requirements of a design contract.

For M2, M3 and M4, learners must carry out a site evaluation and analysis reports using a range of data, presenting information and recommendations within a detailed and well-structured report, for a selected landscape or garden. The location of all key components and characteristics of the site will be recorded using a range of methods. They need to include discussion on the aesthetic, urban, rural, site and land classification characteristics of the site as relevant. Tutors should identify the landscape or garden location or agree it through discussion with learners. Where possible, to ensure assessment is fair the size and complexity of the tasks should be the same for all learners.

For D1, learners must undertake in-depth and professional research into a client's situation including an interview, using documentation prepared, to accurately ascertain most client needs and determine comprehensive requirements of a design contract.

D2 requires learners to present draft design recommendations which are sympathetic with aesthetic, urban, rural, site and land characteristics and based on information interpreted from the client, site evaluation and analysis data.

## Programme of suggested assignments

The following table shows a programme of suggested assignments that cover the pass, merit and distinction

criteria in the grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, P3, P4, P5, P6, P7, M1, D1	The Design Service Package	Production of design service package including client questionnaire and contract documentation with supporting explanation and evaluations of each document.	Design portfolio containing documentation with explanatory notes.
P8, P9, P10, M2, M3, D2	Site Analysis and Evaluation	Undertake site analysis and produce a record using established documentation and making recommendations on the findings.	Practical site investigation. Portfolio report and presentation (site analysis report).
P11, P12, P13, P14, P15, P16, M4	Aspects of Analysis	Discussion of investigation techniques and methods as well as possible problems with the site.	Portfolio report and presentation (site analysis report).

## Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the BTEC Land-based sector suite. This unit has particular links with:

Level 2	Level 3
Undertake Work Related Experience in the Land-based Industries	CU91 Assess the characteristics of sites CU96 Develop, negotiate and agree proposals to offer services and products
	Understand the Principles of Plant Science
	Understand the Principles of Soil Science
	Understand the Principles and Practices of Landscape and Garden Design
	Understand Historical Influences on the Development of Gardens

## Essential resources

Learners will need access to appropriate landscape sites or gardens in order to undertake the survey and recording aspect of the assignments. Learners will also require access to additional resources such as computers and drawing rooms and equipment. The site may be within the centre or an actual landscape/garden design project. Where possible a real client should be used to provide realism in the client designer interaction.

## Employer engagement and vocational contexts

This unit focuses on the documentation and practical aspects of site analysis, including client consultation, within a garden or landscape setting. It will also provide learners with the skills to undertake these activities with a professional approach. Centres are encouraged to create and develop links with local design and build

landscape contractors, architects and garden designers, via guest lectures, workshops or visits, so learners gain an industrial perspective of this work.

## Indicative reading for learners

### Textbooks

Alexander R and Batstone K – *A Handbook for Garden Designers* (Cassell Illustrated, 2006) ISBN 1844033708

Brickell C – *Royal Horticultural Society Gardeners' Encyclopedia of Plants and Flowers* (Dorling Kindersley, 2006) ISBN 1405314540

Brookes J – *Garden Design* (Dorling Kindersley, 2001) ISBN 978-0751309812

Williams R – *The Garden Planner* (Frances Lincoln, 1998) ISBN 978-0711212183

## Delivery of personal, learning and thinking skills (PLTS)

The following table identifies the PLTS opportunities that have been included within the assessment criteria of this unit:

Skill	When learners are ...
<b>Independent enquirers</b>	researching into land classifications researching current legislation regarding contracts and articles of agreement.
<b>Creative thinkers</b>	applying techniques and knowledge while problem solving issues relating to site analysis and client evaluation
<b>Reflective learners</b>	assessing the client's needs and identifying opportunities evaluating their experiences and communicating their learning
<b>Team workers</b>	undertaking the practical activities of site surveying within a team
<b>Self-managers</b>	showing initiative within the analysis and presentation of data building and maintaining relationships with clients
<b>Effective participators</b>	participating effectively in client consultation and contract negotiation.

Although PLTS opportunities are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
<b>Independent enquirers</b>	producing the client questionnaire or site analysis sheets
<b>Creative thinkers</b>	identifying and addressing site-specific issues
<b>Reflective learners</b>	inviting feedback and responding to praise or criticism of their work
<b>Team workers</b>	managing discussion with clients to achieve results
<b>Self-managers</b>	organising own time and resources to achieve assessment goals
<b>Effective participators</b>	identifying improvements through the site analysis that would benefit others.

## ● Functional Skills – Level 2

Skill	When learners are ...
<b>ICT – Use ICT systems</b>	
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	using the internet to research information on contract documentation or legislation concerning commercial articles of agreement
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	
Manage information storage to enable efficient retrieval	
Follow and understand the need for safety and security practices	
Troubleshoot	
<b>ICT – Find and select information</b>	
Select and use a variety of sources of information independently for a complex task	
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	
<b>ICT – Develop, present and communicate information</b>	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> <li>• text and tables</li> <li>• images</li> <li>• numbers</li> <li>• records</li> </ul>	
Bring together information to suit content and purpose	
Present information in ways that are fit for purpose and audience	
Evaluate the selection and use of ICT tools and facilities used to present information	
Select and use ICT to communicate and exchange information safely, responsibly and effectively including storage of messages and contact lists	

Skill	When learners are ...
<b>Mathematics</b>	
Understand routine and non-routine problems in a wide range of familiar and unfamiliar contexts and situations	undertaking linear site surveys and interpreting numerical data on to a drawing, including changes in scales
Identify the situation or problem and the mathematical methods needed to tackle it	
Select and apply a range of skills to find solutions	
Use appropriate checking procedures and evaluate their effectiveness at each stage	
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations	
Draw conclusions and provide mathematical justifications	
<b>English</b>	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	participating in client interaction and discussion to establish a design brief.
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively	