

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance

Specification

NVQ/Competence-based qualifications

First registration February 2011

Issue 2

Edexcel, BTEC and LCCI qualifications

Edexcel, BTEC and LCCI qualifications are awarded by Pearson, the UK's largest awarding body offering academic and vocational qualifications that are globally recognised and benchmarked. For further information, please visit our qualifications website at qualifications.pearson.com. Alternatively, you can get in touch with us using the details on our contact us page at qualifications.pearson.com/contactus

About Pearson

Pearson is the world's leading learning company, with 40,000 employees in more than 70 countries working to help people of all ages to make measurable progress in their lives through learning. We put the learner at the centre of everything we do, because wherever learning flourishes, so do people. Find out more about how we can help you and your learners at qualifications.pearson.com

This specification is Issue 2. Key changes are listed in the summary table on the next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

This qualification was previously known as:

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance (QCF)

The QN remains the same.

References to third party material made in this specification are made in good faith. Pearson does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

All information in this specification is correct at time of publication.

ISBN 9781446957233

All the material in this publication is copyright
© Pearson Education Limited 2017

Summary of Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance specification Issue 2 changes

Summary of changes made between previous issue and this current issue	Page number
All references to QCF have been removed throughout the specification	
Definition of TQT added	1
Definition of sizes of qualifications aligned to TQT	2
TQT value added	6
Guided learning definition updated	17
QCF references removed from unit titles and unit levels in all units	19-195

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

Contents

Introducing Pearson Edexcel NVQ/Competence-based qualifications	1
Qualification title covered by this specification	3
Key features of the Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance	4
What is the purpose of this qualification?	4
Who is this qualification for?	4
What are the benefits of this qualification to the learner and employer?	4
What are the potential construction and the built environment job areas for those working towards this qualification?	4
What progression opportunities are available to learners who achieve this qualification?	5
What is the qualification structure for the Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance?	6
How is the qualification graded and assessed?	12
Assessment strategy	12
Types of evidence (to be read in conjunction with the assessment strategy in <i>Annexe C</i>)	13
Additional requirements	14
Centre recognition and approval	15
Centre recognition	15
Approvals agreement	15
Quality assurance	15
What resources are required?	15
Unit format	17
Units 19	
Unit 1: Manage self and relationships and service standards within a surveying environment	21
Unit 2: Manage your own work within a surveying environment	31
Unit 3: Ensure that your own actions reduce risks to health and safety within a surveying environment	37
Unit 4: Contribute to assessing of the condition of property within a surveying environment	45
Unit 5: Plan, implement and monitor the maintenance of property within a surveying environment	53

Unit 6: Analyse and evaluate research data and provide within a surveying environment	61
Unit 7: Use technical information systems and information technology within a surveying environment	69
Unit 8: Collect, analyse and present measured survey data within a surveying environment	75
Unit 9: Contribute to the preparation and processing of tender procurement within a surveying environment	81
Unit 10: Prepare procurement programmes and schedules of work within a surveying environment	91
Unit 11: Contribute to the co-ordination of site preparation and work programme within a surveying environment	99
Unit 12: Monitor works within a surveying environment	109
Unit 13: Control income and expenditure within a surveying environment	119
Unit 14: Manage contract cost control within a surveying environment	125
Unit 15: Prepare information relevant to dispute resolution within a surveying environment	135
Unit 16: Measure and draft bills of quantities within a surveying environment	143
Unit 17: Contribute to and process property agreements within a surveying environment	151
Unit 18: Contribute to processing property acquisitions within a surveying environment	157
Unit 19: Progress property disposals within a surveying environment	167
Unit 20: Contribute to the appraisal and valuation of property within a surveying environment	177
Unit 21: Develop and implement property management plan within a surveying environment	185
Further information and useful publications	193
How to obtain National Occupational Standards	193
To obtain the National Occupational Standards go to www.ukstandards.org.uk	
Professional development and training	193
Annexe A: Quality assurance	197
Key principles of quality assurance	197
Quality assurance processes	197
Annexe B: Centre certification and registration	199
What are the access arrangements and special considerations for the qualification in this specification?	199
Annexe C: Assessment strategy	201

Introducing Pearson Edexcel NVQ/Competence-based qualifications

What are NVQ/Competence-based qualifications?

National Vocational Qualifications (NVQs)/Competence-based qualifications are work-based qualifications that give learners the opportunity to develop and demonstrate their competence in the area of work or job role to which the qualification relates.

NVQs/Competence-based qualifications are based on recognised occupational standards for the appropriate sector. Occupational standards define what employees, or potential employees, must be able to do and know, and how well they should undertake work tasks and work roles. These standards are written in broad terms to enable employers and providers to apply them to a wide range of related occupational areas.

NVQs/Competence-based qualifications are outcomes-based with no fixed learning programme, therefore allowing flexible delivery to meet the individual learner's needs. At Level 2 and above, these qualifications are recognised as approved training and development courses for employees that have been in the workplace for some time or as a way of inducting, training and developing new entrants into the workplace. Qualifications at Level 1 can be used in Traineeships, which enables progression to entry level employment or to Apprenticeship programmes.

Learners will work towards their qualification in the workplace or in settings that replicate the working environment as specified in the assessment requirements. Colleges, training centres and/or employers can offer these qualifications as long as they have access to appropriate physical and human resources and have the necessary quality assurance systems in place.

Sizes of NVQ/Competence-based qualifications

For all regulated qualifications, Pearson specify a total number of hours that it is estimated learners will require to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, Pearson identifies the number of Guided Learning Hours (GLH) that we estimate a centre delivering the qualification might provide. Guided learning means activities, such as lessons, tutorials, online instruction, supervised study and giving feedback on performance, that directly involve tutors and assessors in teaching, supervising and invigilating learners. Guided learning includes the time required for learners to complete external assessment under examination or supervised conditions.

In addition to guided learning, other required learning directed by tutors or assessors will include private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

NVQ/Competence-based qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

Qualification title covered by this specification

This specification gives you the information you need to offer the Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance:

Qualification title	Qualification Number (QN)	Accreditation start date
Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance	600/0726/6	01/02/11

Qualifications eligible and funded for post-16-year-olds can be found on the funding Hub. The Skills Funding Agency also publishes a funding catalogue that lists the qualifications available for 19+ funding.

You should use the Qualification Number (QN), when you wish to seek public funding for your learners. Each unit within a qualification will also have a unique reference number, which is listed in this specification.

The qualification title and unit reference numbers will appear on learners' final certification document. Learners need to be made aware of this when they are recruited by the centre and registered with Pearson.

Key features of the Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance

This qualification:

- is nationally recognised
- is based on the ConstructionSkills National Occupational Standards (NOS). The NOS, assessment strategy and qualification structure are owned by ConstructionSkills.

The Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance has been approved as a component for the ConstructionSkills Advanced Apprenticeship framework.

What is the purpose of this qualification?

This qualification is appropriate for employees in the construction and the built environment sector working across a broad range of areas. It is designed to assess occupational competence in the workplace where learners are required to demonstrate skills and knowledge to a level required in the construction and the built environment sector.

Who is this qualification for?

This qualification is for all learners aged 16 and above who are capable of reaching the required standards.

Pearson's policy is that the qualification should:

- be free from any barriers that restrict access and progression
- ensure equality of opportunity for all wishing to access the qualification.

What are the benefits of this qualification to the learner and employer?

This qualification allows learners to demonstrate competence against NOS that are based on the needs of the construction and the built environment sector, as defined by ConstructionSkills, the Sector Skills Council. The qualification contributes to the development of skilled labour in the sector. The qualification may contribute towards the competence element of an Apprenticeship.

What are the potential construction and the built environment job areas for those working towards this qualification?

- Maintenance
- Quantity surveying
- General practice
- Building surveying
- Valuation.

What progression opportunities are available to learners who achieve this qualification?

This qualification allows learners to demonstrate competence in surveying, property and maintenance at a level required by the construction industry. Learners can progress across the level and size of the construction and built environment competence and knowledge qualifications and into other occupational areas such as team leading and management.

What is the qualification structure for the Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance?

The Total Qualification Time (TQT) for this qualification is 850 hours.

The Guided Learning Hours (GLH) for this qualification is 330.

To achieve the **Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance** learners must complete the required units from one of the following pathways.

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Maintenance Management

Learners must complete all the units in Group A1, a minimum of one unit in Group A2 and a minimum of one unit in Group A3, for a minimum total of 88 credits.

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Quantity Surveying

Learners must complete all the units in Group B1, a minimum of one unit in Group B2 and a minimum of one unit in Group B3, for a minimum total of 85 credits.

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – General Practice

Learners must complete all the units in Group C1, a minimum of one unit in Group C2 and a minimum of one unit in Group C3, for a minimum total of 85 credits.

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Building Surveying

Learners must complete all the units in Group D1, a minimum of one unit in Group D2 and a minimum of one unit in Group D3, for a minimum total of 87 credits.

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Valuation

Learners must complete all the units in Group E1, a minimum of one unit in Group E2 and a minimum of one unit in Group E3, for a minimum total of 89 credits.

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Maintenance Management

A1 – Mandatory units

Learners must complete all the units in Group A1.

A/601/8820 - Manage self and relationships and service standards within a surveying environment

F/601/8821 - Manage your own work within a surveying environment

J/601/8822 - Ensure that your own actions reduce risks to health and safety within a surveying environment

Y/601/8839 - Contribute to assessing of the condition of property within a surveying environment

K/601/8862 - Plan, implement and monitor the maintenance of property within a surveying environment

A2 – Optional units

Learners must complete a minimum of one unit in Group A2.

H/601/8830 - Analyse and evaluate research data and provide within a surveying environment

A/601/8834 - Use technical information systems and information technology within a surveying environment

A3 – Optional units

Learners must complete a minimum of one unit in Group A3.

J/601/8836 - Collect, analyse and present measured survey data within a surveying environment

K/601/8845 - Contribute to the preparation and processing of tender procurement within a surveying environment

T/601/8847 - Prepare procurement programmes and schedules of work within a surveying environment

A/601/8848 - Contribute to the co-ordination of site preparation and work programme within a surveying environment

F/601/8849 - Monitor works within a surveying environment

A/601/8851 - Control income and expenditure within a surveying environment

H/601/8858 - Manage contract cost control within a surveying environment

Y/601/8873 - Prepare information relevant to dispute resolution within a surveying environment

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Quantity Surveying

B1 - Mandatory units

Learners must complete all the units in Group B1.

A/601/8820 - Manage self and relationships and service standards within a surveying environment

F/601/8821 - Manage your own work within a surveying environment

J/601/8822 - Ensure that your own actions reduce risks to health and safety within a surveying environment

H/601/8844 - Measure and draft bills of quantities within a surveying environment

H/601/8858 - Manage contract cost control within a surveying environment

B2 - Optional units

Learners must complete a minimum of one unit in Group B2.

H/601/8830 - Analyse and evaluate research data and provide within a surveying environment

A/601/8834 - Use technical information systems and information technology within a surveying environment

B3 - Optional units

Learners must complete a minimum of one unit in Group B3.

J/601/8836 - Collect, analyse and present measured survey data within a surveying environment

K/601/8845 - Contribute to the preparation and processing of tender procurement within a surveying environment

A/601/8851 - Control income and expenditure within a surveying environment

Y/601/8873 - Prepare information relevant to dispute resolution within a surveying environment

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – General Practice

C1 - Mandatory units

Learners must complete all the units in Group C1.

A/601/8820 - Manage self and relationships and service standards within a surveying environment

F/601/8821 - Manage your own work within a surveying environment

J/601/8822 - Ensure that your own actions reduce risks to health and safety within a surveying environment

Y/601/8839 - Contribute to assessing of the condition of property within a surveying environment

L/601/8868 - Contribute to and process property agreements within a surveying environment

C2 - Optional units

Learners must complete a minimum of one unit in Group C2.

H/601/8830 - Analyse and evaluate research data and provide within a surveying environment

A/601/8834 - Use technical information systems and information technology within a surveying environment

C3 - Optional units

Learners must complete a minimum of one unit in Group C3.

J/601/8836 - Collect, analyse and present measured survey data within a surveying environment

A/601/8851 - Control income and expenditure within a surveying environment

A/601/8865 - Contribute to processing property acquisitions within a surveying environment

F/601/8866 - Progress property disposals within a surveying environment

J/601/8870 - Contribute to the appraisal and valuation of property within a surveying environment

L/601/8871 - Develop and implement property management plan within a surveying environment

Y/601/8873 - Prepare information relevant to dispute resolution within a surveying environment

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Building Surveying

D1 - Mandatory units

Learners must complete all the units in Group D1.

A/601/8820 - Manage self and relationships and service standards within a surveying environment

F/601/8821 - Manage your own work within a surveying environment

J/601/8822 - Ensure that your own actions reduce risks to health and safety within a surveying environment

Y/601/8839 - Contribute to assessing of the condition of property within a surveying environment

F/601/8849 - Monitor works within a surveying environment

D2 - Optional units

Learners must complete a minimum of one unit in Group D2.

H/601/8830 - Analyse and evaluate research data and provide within a surveying environment

A/601/8834 - Use technical information systems and information technology within a surveying environment

D3 - Optional units

Learners must complete a minimum of one unit in Group D3.

J/601/8836 - Collect, analyse and present measured survey data within a surveying environment

K/601/8845 - Contribute to the preparation and processing of tender procurement within a surveying environment

T/601/8847 - Prepare procurement programmes and schedules of work within a surveying environment

A/601/8848 - Contribute to the co-ordination of site preparation and work programme within a surveying environment

H/601/8858 - Manage contract cost control within a surveying environment

K/601/8862 - Plan, implement and monitor the maintenance of property within a surveying environment

Pearson Edexcel Level 3 NVQ Diploma in Surveying, Property and Maintenance – Valuation

E1 - Mandatory units

Learners must complete all the units in Group E1.

A/601/8820 - Manage self and relationships and service standards within a surveying environment

F/601/8821 - Manage your own work within a surveying environment

J/601/8822 - Ensure that your own actions reduce risks to health and safety within a surveying environment

Y/601/8839 - Contribute to assessing of the condition of property within a surveying environment

J/601/8870 - Contribute to the appraisal and valuation of property within a surveying environment

E2 - Optional units

Learners must complete a minimum of one unit in Group E2.

H/601/8830 - Analyse and evaluate research data and provide within a surveying environment

A/601/8834 - Use technical information systems and information technology within a surveying environment

E3 - Optional units

Learners must complete a minimum of one unit in Group E3.

J/601/8836 - Collect, analyse and present measured survey data within a surveying environment

A/601/8865 - Contribute to processing property acquisitions within a surveying environment

F/601/8866 - Progress property disposals within a surveying environment

L/601/8868 - Contribute to and process property agreements within a surveying environment

Y/601/8873 - Prepare information relevant to dispute resolution within a surveying environment

How is the qualification graded and assessed?

The overall grade for the qualification is a 'pass'. The learner must achieve all the required units within the specified qualification structure.

To pass a unit the learner must:

- achieve **all** the specified learning outcomes
- satisfy **all** the assessment criteria by providing sufficient and valid evidence for each criterion
- show that the evidence is their own.

The qualification is designed to be assessed:

- in the workplace or
- in conditions resembling the workplace, as specified in the assessment strategy for the sector, or
- as part of a training programme.

Assessment strategy

The assessment strategy for this qualification has been included in *Annexe C*. It has been developed by ConstructionSkills in partnership with employers, training providers, awarding organisations and the regulatory authorities. The assessment strategy includes details on:

- criteria for defining realistic working environments
- roles and occupational competence of assessors, expert witnesses, internal verifiers and standards verifiers
- quality control of assessment
- evidence requirements.

Evidence of competence may come from:

- **current practice** where evidence is generated from a current job role
- a **programme of development** where evidence comes from assessment opportunities built into a learning/training programme whether at or away from the workplace
- the **Recognition of Prior Learning (RPL)** where a learner can demonstrate that they can meet the assessment criteria within a unit through knowledge, understanding or skills they already possess without undertaking a course of learning. They must submit sufficient, reliable and valid evidence for internal and standards verification purposes. RPL is acceptable for accrediting a unit, several units or a whole qualification
- a **combination** of these.

It is important that the evidence is:

Valid	relevant to the standards for which competence is claimed
Authentic	produced by the learner
Current	sufficiently recent to create confidence that the same skill, understanding or knowledge persist at the time of the claim
Reliable	indicates that the learner can consistently perform at this level
Sufficient	fully meets the requirements of the standards.

Types of evidence (to be read in conjunction with the assessment strategy in *Annexe C*)

To successfully achieve a unit the learner must gather evidence which shows that they have met the required standard in the assessment criteria. Evidence can take a variety of different forms including the examples below. Centres should refer to the assessment strategy for information about which of the following are permissible.

- direct observation of the learner's performance by their assessor (O)
- outcomes from oral or written questioning (Q&A)
- products of the learner's work (P)
- personal statements and/or reflective accounts (RA)
- outcomes from simulation, where permitted by the assessment strategy (S)
- professional discussion (PD)
- assignment, project/case studies (A)
- authentic statements/witness testimony (WT)
- expert witness testimony (EPW)
- evidence of Recognition of Prior Learning (RPL).

The abbreviations may be used for cross-referencing purposes.

Learners can use one piece of evidence to prove their knowledge, skills and understanding across different assessment criteria and/or across different units. It is, therefore, not necessary for learners to have each assessment criterion assessed separately. Learners should be encouraged to reference the assessment criteria to which the evidence relates.

Evidence must be made available to the assessor, internal verifier and Pearson standards verifier. A range of recording documents is available on the Pearson website qualifications.pearson.com. Alternatively, centres may develop their own.

Additional requirements

The Joint Awarding Body and the SSC Working Practices Group have identified additional requirements that are needed to assess and quality assure qualifications placed on the QCF that use NVQ within their title. These requirements are shown in *Annexe D: Additional requirement for qualifications that use the term 'NVQ' in a QCF qualification title*.

Centre recognition and approval

Centre recognition

Centres that have not previously offered Pearson qualifications need to apply for and be granted centre recognition as part of the process for approval to offer individual qualifications. New centres must complete both a centre recognition approval application and a qualification approval application.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by the new qualification and the conditions for automatic approval are met. Centres already holding Pearson approval are able to gain qualification approval for a different level or different sector via Edexcel online.

Approvals agreement

All centres are required to enter into an approvals agreement which is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any linked codes or regulations. Pearson will act to protect the integrity of the awarding of qualifications, if centres do not comply with the agreement. This could result in the suspension of certification or withdrawal of approval.

Quality assurance

Detailed information on Pearson's quality assurance processes is given in *Annexe A*.

What resources are required?

This qualification is designed to support learners working in the construction and the built environment sector. Physical resources need to support the delivery of the qualification and the assessment of the learning outcomes and must be of industry standard.

Centres must meet any specific resource requirements outlined in *Annexe C: Assessment strategy*. Staff assessing the learner must meet the requirements within the overarching assessment strategy for the sector.

Unit format

Each unit in this specification contains the following sections.

Unit title:					This is the formal title of the unit that will appear on the learner's certificate
Unit reference number:					This is the unit owner's reference number for the specified unit.
Level:					All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.
Credit value:					All units have a credit value. The minimum credit value is one, and credits can only be awarded in whole numbers. Learners will be awarded credits when they achieve the unit.
Guided learning hours:					Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.
Unit summary:					This provides a summary of the purpose of the unit.
Assessment requirements/evidence requirements:					The assessment/evidence requirements are determined by the SSC. Learners must provide evidence for each of the requirements stated in this section.
Assessment methodology:					This provides a summary of the assessment methodology to be used for the unit.
Learning outcomes:	Assessment criteria:	Evidence type:	Portfolio reference:	Date:	
			The learner should use this box to indicate where the evidence can be obtained eg portfolio page number.	The learner should give the date when the evidence has been provided.	
Learning outcomes state exactly what a learner should know, understand or be able to do as a result of completing a unit.		The assessment criteria of a unit specify the standard a learner is expected to meet to demonstrate that a learning outcome, or a set of learning outcomes, has been achieved.		Learners must reference the type of evidence they have and where it is available for quality assurance purposes. The learner can enter the relevant key and a reference. Alternatively, the learner and/or centre can devise their own referencing system.	

Units

Unit 1: Manage self and relationships and service standards within a surveying environment

Unit reference number: A/601/8820

Level: 3

Credit value: 10

Guided learning hours: 20

Unit summary

This unit is about understanding your own job role, and how you can develop in that role. The unit looks at time management, types of communication and how to deal with customers, external and internal, and dealing with difficult situations.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Aims and objectives:
 - addressing strengths and weaknesses
 - compliance with the employer and professional requirements.
- 2 Measure progress:
 - organisational standards
 - industry standards.
- 3 Development plan:
 - priorities
 - target dates
 - development activities.
- 4 Sources of support and guidance:
 - national/industry bodies
 - professional institutions
 - education and training providers
 - in house.

- 5 Development activities:
 - formal/informal learning
 - research
 - work experience.
- 6 Organising your work:
 - estimate time needed
 - prioritise
 - decision taking
 - minimising interruptions
 - review progress and adjust as necessary.

Learning outcomes 3 and 4

- 1 Working relationships:
 - formal
 - informal.
- 2 People:
 - senior and junior colleagues;
 - customers or clients
 - people outside your organisation.
- 3 Presenting information:
 - orally
 - in writing
 - graphically
 - electronically.
- 4 Work activities:
 - progress
 - results
 - achievements.

Learning outcomes 5 and 6

- 1 Complaints and service standards:
 - internal
 - external.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Unit.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of personal development needs, aims and objectives, development activities and sources of support and guidance (1.1, 1.2, 1.3, 1.4) [1.1, 1.4, 1.5]
- 2 Personal development plan(s) which include identified development needs and sources of support and guidance (1.3, 1.4) [1.3, 1.4]
- 3 Record(s) of progress achieved and evidence of competence gained (1.5, 1.6, 1.7)

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Information and advice provided about work activities (3.1, 3.2, 3.3) [3.1, 3.2, 3.3, 3.4]

Simulations are not considered to be acceptable for producing evidence for this element.

Process evidence

- 1 Presenting information about work activities

Learning outcome 5

Product evidence

Simulations are considered to be acceptable for producing evidence for the following item(s) which are considered to be rare, but key/critical to demonstrating competence. The following conditions of realism should be present:

- contingencies
 - relationship with people
 - type of interaction
 - communication methods and media
 - information and data.
- 1 Investigations of complaints and service standards, action taken and checks that complainants are satisfied. (5.1, 5.2, 5.3, 5.4) [5.1]
 - 2 Identified potential and recurring problems within service standards, systems and procedures and steps taken to resolve them (5.5, 5.6) [5.1]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to manage your own resources and personal development	1.1 identify and agree with appropriate colleagues the requirements of your work role, personal aims and objectives and how you will measure progress 1.2 identify any gaps between the requirements of your work role and your current knowledge, understanding and skills 1.3 discuss and agree with appropriate colleagues a development plan for achieving identified development needs 1.4 undertake development activities aimed at achieving your development plan use appropriate sources of support and guidance 1.5 record, measure and review progress and evidence of competence gained 1.6 organise your work to make efficient use of your time and resources 1.7 check on a regular basis how you are use your time at work and identify possible improvements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to manage your own resources and personal development	2.1 describe how to identify and agree with appropriate colleagues the requirements of your work role, personal aims and objectives and how you will measure progress 2.2 describe how to identify any gaps between the requirements of your work role and your current knowledge, understanding and skills 2.3 explain how to discuss and agree with appropriate colleagues a development plan for achieving identified development needs 2.4 evaluate how to undertake development activities aimed at achieving your development plan use appropriate sources of support and guidance 2.5 explain how to record, measure and review progress and evidence of competence gained 2.6 propose how to organise your work to make efficient use of your time and resources 2.7 explain how to check on a regular basis how you are use your time at work and identify possible improvements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to manage relationships	3.1 develop, maintain and encourage professional working relationships 3.2 present information to people about work activities in an appropriate level of detail and in a timely fashion 3.3 offer information, advice and help to people about work activities in an appropriate manner, encourage questions and feedback 3.4 deal with differences of opinion in ways which minimise offence, and resolve conflicts in ways that maintain respect and honesty			
4 Understand how to manage relationships	4.1 propose how to develop, maintain and encourage professional working relationships 4.2 explain how to present information to people about work activities in an appropriate level of detail and in a timely fashion 4.3 explain how to offer information, advice and help to people about work activities in an appropriate manner, encourage questions and feedback 4.4 propose how to deal with differences of opinion in ways which minimise offence, and resolve conflicts in ways that maintain respect and honesty			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to respond to complaints and service standards	5.1 respond appropriately to complaints and service standards according to the organisational policy and procedures 5.2 investigate the complaint to assess whether it is justified and, if so, what action needs to be taken to resolve the problem satisfactorily 5.3 attempt to resolve complaints and problems expediently where it is within own area of authority and working with others where necessary 5.4 advise complainants of the action being taken to address their complaint and keep them informed of progress 5.5 identify potential or recurring problems within service standards systems and procedures that might affect others before they become aware of them and notify line manager 5.6 inform line manager and appropriate colleagues of the steps taken to resolve specific problems including any recurring problems			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Understand how to respond to complaints and service standards	<p>6.1 explain how to respond appropriately to complaints and service standards according to the organisational policy and procedures</p> <p>6.2 examine how to investigate the complaint to assess whether it is justified and, if so, what action needs to be taken to resolve the problem satisfactorily</p> <p>6.3 propose how to attempt to resolve complaints and problems expediently where it is within own area of authority and work with others where necessary</p> <p>6.4 propose how to advise complainants of the action to be taken to address their complaint and keep them informed of progress</p> <p>6.5 describe how to identify potential or recurring problems within service standards systems and procedures that might affect others before they become aware of them and notify line manager</p> <p>6.6 explain how to inform line manager and appropriate colleagues of the steps taken to resolve specific problems including any recurring problems</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 2: **Manage your own work within a surveying environment**

Unit reference number: F/601/8821

Level: 3

Credit value: 8

Guided learning hours: 20

Unit summary

This unit is about the drafting of documentation which could be of a legal nature. It is also about time management and the best ways of being efficient with your time.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Documents:
 - for self
 - for others.
- 2 Legal and regulatory requirements:
 - statutory
 - non-statutory.

Learning outcomes 3 and 4

- 1 Use **one** of the following to plan your workload:
 - short- and long-term targets
 - break targets down into smaller activities
 - order activities in terms of importance
 - establish the time involved.
- 2 Use **one** of the following to monitor your work:
 - work log
 - diary.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Documents
- 2 Record(s) of checks made (1.5, 1.6)

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Note(s) about what you plan and what you actually do
- 2 Record(s) about work you have delegated to other people

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to draft documents to meet specified requirements	1.1 confirm the purpose of the documents 1.2 complete documents to meet specified requirements and deadlines. 1.3 ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with conventions and house style 1.4 ensure that the content of documents is comprehensive, accurate, succinct and provides sufficient guidance to decision makers 1.5 ensure that sources of information, on which documents are based, are verified as accurate and valid 1.6 ensure work practices are in accordance with legal and regulatory requirements and organisational procedures 1.7 maintain security and confidentiality of information			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to draft documents to meet specified requirements	2.1 explain how to confirm the purpose of the documents 2.2 explain how to complete documents to meet specified requirements and deadlines. 2.3 explain how to ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with conventions and house style 2.4 explain how to ensure that the content of documents is comprehensive, accurate, succinct and provides sufficient guidance to decision makers 2.5 explain how to ensure that sources of information, on which documents are based, are verified as accurate and valid 2.6 explain how to ensure work practices are in accordance with legal and regulatory requirements and organisational procedures 2.7 explain how to maintain security and confidentiality of information			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to decide how to make better use of your time and other people	3.1 put the improvements that you have identified into order of importance 3.2 decide if there are any things that you do that could be done by other people 3.3 decide how you can use your strengths and weaknesses to your own advantage 3.4 plan how you will change the way you carry out your work 3.5 monitor your work to check improvements in your effectiveness and efficiency			
4 Understand how to decide how to make better use of your time and other people	4.1 explain how to put the improvements that you have identified into order of importance 4.2 evaluate how to decide if there are any things that you do that could be done by other people 4.3 evaluate how to decide how you can use your strengths and weaknesses to your own advantage 4.4 propose how to plan how you will change the way you carry out your work 4.5 examine how to monitor your work to check improvements in your effectiveness and efficiency			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 3: Ensure that your own actions reduce risks to health and safety within a surveying environment

Unit reference number: J/601/8822

Level: 3

Credit value: 11

Guided learning hours: 40

Unit summary

This unit is about the health and safety responsibilities of everyone in the workplace. It describes the competences required to make sure that:

- your own actions do not create any health and safety hazards
- you do not ignore significant risks in your workplace, and
- you take sensible action to put things right, including reporting situations which pose a danger to people in the workplace and seeking advice.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

1 Risks:

- the use and maintenance of machinery or equipment
- the use of materials or substances
- working practices which do not conform to laid down policies
- unsafe behaviour
- accidental breakages and spillages
- environmental factors.

Learning outcomes 3 and 4

1 Risk management:

- hazard identification
- risk assessment
- prevention and protection
- method statement.

- 2 Health and safety legislation:
 - construction specific
 - general.
- 3 Hazards:
 - falls from height
 - fire
 - slips, trips and falls (same level)
 - hit by falling or moving objects
 - manual handling
 - health and environmental issues
 - power sources
 - hazardous substances
 - trapped by something collapsing or overturning
 - confined spaces
 - water.
- 4 Risks:
 - high
 - medium
 - low.
- 5 Methods:
 - eliminate
 - control at source
 - cumulative protection
 - manage
 - personal protection equipment.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the element.

Performance evidence

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.

Learning outcome 1

Product evidence

- 1 Evidence must be provided to demonstrate competence in identifying hazards with reference to working activities or aspects of the workplace and acting upon your decisions as to whether the hazard presents a high or low risk
- 2 Performance evidence must be provided against each of the assessment criteria. The assessor will also need to be satisfied that you have the necessary knowledge and understanding to perform competently in respect of all the range items listed in this unit.

- 3 You must show from the range that you have: identified a minimum of two types of risks resulting from those listed. Performance evidence must be provided from real working practices.

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Records of the implementation and maintenance of risk management methods which include details of the hazards and risks, current health and safety legislation, selected risk reduction methods, necessary resources and activities, and any changes to the procedures confirmed.
- 2 Records of implemented, maintained and reviewed risk reduction methods (3.6, 3.7) [3.4, 3.5]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to identify the hazards and evaluate the risks in your workplace</p>	<p>1.1 correctly name and locate the persons responsible for health and safety in the workplace</p> <p>1.2 identify which workplace policies are relevant to your working practices</p> <p>1.3 identify those working practices in any part of your job role which could harm yourself or other persons</p> <p>1.4 identify those aspects of the workplace which could harm yourself or other persons</p> <p>1.5 evaluate which of the potentially harmful working practices and the potentially harmful aspects of the workplace are those with the highest risk to you or to others</p> <p>1.6 report those hazards which present a high risk to the persons responsible for health and safety in the workplace</p> <p>1.7 deal with hazards with low risks in accordance with workplace policies and legal requirements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to identify the hazards and evaluate the risks in your workplace	2.1 explain how to correctly name and locate the persons responsible for health and safety in the workplace 2.2 describe how to identify which workplace policies are relevant to your working practices 2.3 describe how to identify those working practices in any part of your job role which could harm yourself or other persons 2.4 describe how to identify those aspects of the workplace which could harm yourself or other persons 2.5 evaluate which of the potentially harmful working practices and the potentially harmful aspects of the workplace are those with the highest risk to you or to others 2.6 explain how to report those hazards which present a high risk to the persons responsible for health and safety in the workplace 2.7 explain how to deal with hazards with low risks in accordance with workplace policies and legal requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to implement methods and procedures to reduce risks	3.1 adopt risk management processes in accordance with current health and safety legislation 3.2 identify details of the hazards and risks 3.3 select the most effective methods to reduce risks 3.4 identify the resources that are necessary to implement the risk reduction methods 3.5 identify the activities required to implement the risk reduction methods 3.6 implement, maintain and review risk reduction methods and procedures 3.7 confirm any changes to the procedures for implementing the risk reduction methods			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to implement methods and procedures to reduce risks	4.1 explain how to adopt risk management processes in accordance with current health and safety legislation 4.2 describe how to identify details of the hazards and risks 4.3 evaluate how to select the most effective methods to reduce risks 4.4 describe how to identify the resources that are necessary to implement the risk reduction methods 4.5 describe how to identify the activities required to implement the risk reduction methods 4.6 explain how to implement, maintain and review risk reduction methods and procedures 4.7 explain how to confirm any changes to the procedures for implement the risk reduction methods			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 4: Contribute to assessing of the condition of property within a surveying environment

Unit reference number: Y/601/8839

Level: 3

Credit value: 20

Guided learning hours: 80

Unit summary

This unit concerns the carrying out of surveys of the condition of land or buildings. It covers the preparation phase, the completion of the survey and recording the results.

You will need to observe, measure, check and record the key features of the selected property.

You will need to be able to identify and report any breaches of statutory requirements. You will need to collate the findings of a property condition survey and assist with the preparation of the final report.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Purpose of the survey:
 - land
 - building.
- 2 Survey - method:
 - visual inspection
 - measurement.
- 3 Arrangements:
 - permissions
 - access
 - personal health and safety
 - security.

- 4 Equipment:
- mechanical
 - optical
 - electronic.

Learning outcomes 3 and 4

- 1 Inspection (purpose):
- land
 - building.
- 2 record:
- written
 - graphical
 - photographic
 - electronic.
- 3 Reporting:
- written
 - graphical
 - photographic
 - electronic.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance Evidence

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.

Learning outcome 1

Product evidence

Simulations are considered to be acceptable for producing evidence for the following item(s) which are considered to be rare, but key/critical to demonstrating competence. The following conditions of realism should be present:

- tools, equipment and instruments
 - standards and quality specifications
 - physical conditions
 - information and data.
- 1 Record(s) of pre-work checks and confirmation of the chosen survey method and arrangements and purpose of survey (1.1, 1.2, 1.3) [1.1, 1.2, 1.3]
- 2 Record(s) of equipment checks and adjustments (1.4, 1.5) [1.4]

Process evidence

- 1 Checks and adjustment of equipment (1.5) [1.4]

Learning outcome 3

Product evidence:

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of inspection(s) which include observations and measurements, agreed formats (3.1) [3.1, 3.2, 3.3]
- 2 Record(s) of further investigation(s) to identify any inconsistencies (3.2) [3.1, 3.2]
- 3 Collated survey information (3.5) [3.3]
- 4 Reports of any breaches of statutory requirements (3.4) [3.3]
- 5 Internal record(s) (3.6, 3.7) [3.1, 3.2]

Process evidence

- 1 Observations and measurements (3.1, 3.2, 3.5) [3.1, 3.2, 3.3]

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to contribute to the preparation of survey operations	1.1 confirm the objectives and purpose of the survey 1.2 confirm with the people who will be affected, that the chosen survey method is appropriate for the purpose before starting the work 1.3 check and confirm, before starting work, that all necessary arrangements have been made 1.4 arrange for relevant equipment to be brought to the site and kept safely and securely 1.5 check and adjust equipment so that it is accurate			
2	Understand how to contribute to the preparation of survey operations	2.1 explain how to confirm the objectives and purpose of the survey 2.2 explain how to confirm with the people who will be affected, that the chosen survey method is appropriate for the purpose before starting the work 2.3 explain how to check and confirm, before starting work, that all necessary arrangements have been made 2.4 explain how to arrange for relevant equipment to be brought to the site and kept safely and securely 2.5 explain how to check and adjust equipment so that it is accurate			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to contribute to the inspection and reporting process	3.1 take accurate observations and measurements which are necessary for the inspection and record them clearly, accurately and completely using agreed formats 3.2 make further investigations when observations are inconsistent with existing data and expected findings, and notify line managers 3.3 identify and record evidence of defects and seek advice where implications appear serious 3.4 identify and report any obvious breaches of statutory requirements to line manager 3.5 assemble and collate survey information which is accurate, complete and appropriate to the requirements of the survey process 3.6 assist in the preparation of a survey report which is accurate and complete and meets the purpose of the survey 3.7 explain clearly where and why accurate inspection and measurement has not been possible 3.8 maintain internal records which are clear, accurate and complete and conform to accepted professional and statutory requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Understand how to contribute to the inspection and reporting process</p>	<p>4.1 explain how to take accurate observations and measurements which are necessary for the inspection and record them clearly, accurately and completely using agreed formats</p> <p>4.2 examine how to make further investigations when observations are inconsistent with existing data and expected findings, and notify line managers</p> <p>4.3 describe how to identify and record evidence of defects and seek advice where implications appear serious</p> <p>4.4 describe how to identify and report any obvious breaches of statutory requirements to line manager</p> <p>4.5 explain how to assemble and collate survey information which is accurate, complete and appropriate to the requirements of the survey process</p> <p>4.6 explain how to assist in the preparation of a survey report which is accurate and complete and meets the purpose of the survey</p> <p>4.7 explain clearly where and why accurate inspection and measurement has not been possible</p> <p>4.8 explain how to maintain internal records which are clear, accurate and complete and conform to accepted professional and statutory requirements</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 5: Plan, implement and monitor the maintenance of property within a surveying environment

Unit reference number: K/601/8862

Level: 3

Credit value: 17

Guided learning hours: 70

Unit summary

This unit is about the development of programmes for planned maintenance and the setting up of maintenance programmes for emergency/unplanned works, checking and verifying work undertaken.

Assessment requirements/evidence requirements

Range

The following ranges apply:

Learning outcomes 1 and 2

- 1 Maintenance:
 - scheduled and preventative;
 - unscheduled and corrective;
 - emergency.
- 2 Planned preventative maintenance:
 - structure
 - materials
 - finishes
 - fittings
 - services
 - external works.
- 3 Influencing factors:
 - changing user requirements
 - contractual requirements
 - statutory requirements
 - health and safety requirements
 - resource allocation
 - operational requirements

- environmental considerations
 - fair wear and tear/damage
 - energy performance of the building.
- 4 Guidance material:
- owner's manuals
 - logbooks
 - maintenance schedules and manuals
 - practice guides and specifications.

Learning Outcomes 3 and 4

- 1 Maintenance:
- scheduled and preventative
 - unscheduled and corrective
 - emergency.
- 2 Planned preventative maintenance:
- structure
 - materials
 - finishes
 - fittings
 - services
 - external works.
- 3 Statutory requirements:
- testing
 - examination
 - inspection
 - certification
 - health and safety.
- 4 Resources:
- materials
 - plant and equipment
 - finance
 - time
 - personnel.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Agreed plan(s) and schedule(s) of plans and schedules of maintenance which include agreed organisational objectives for the planned preventative maintenance, reviews of influencing factors, guidance material and priorities

Simulations are not considered to be acceptable for producing evidence for this Element

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of implemented and monitored maintenance programmes and of recommended action taken to address resource and performance issues (3.1, 3.2, 3.3) [3.1, 3.2, 3.3, 3.4]
- 2 Monitoring records (3.4) [3.2, 3.3, 3.4]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' `Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to plan and schedule a planned preventative maintenance programme</p>	<p>1.1 plan and schedule in accordance with agreed objectives for the planned preventative maintenance of property</p> <p>1.2 review influencing factors and guidance material about the planned preventative maintenance of property</p> <p>1.3 prioritise the maintenance and have regard to all the influencing factors</p> <p>1.4 prepare and agree plans and schedules of maintenance for implementation with the line manager</p>			
<p>2 Understand how to plan and schedule a planned preventative maintenance programme</p>	<p>2.1 propose how to plan and schedule in accordance with agreed objectives for the planned preventative maintenance of property</p> <p>2.2 examine how to review influencing factors and guidance material about the planned preventative maintenance of property</p> <p>2.3 examine how to prioritise the maintenance and have regard to all the influencing factors</p> <p>2.4 explain how to prepare and agree plans and schedules of maintenance for implementation with the line manager</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to implement and monitor planned preventative maintenance and emergency works	3.1 implement the maintenance programme 3.2 monitor the programme and address specific resources and performance issues and recommend appropriate action during the execution of the works 3.3 ensure the compliance of statutory requirements for the maintenance of both planned preventative and emergency works 3.4 ensure that accurate monitor records are maintained and retained			
4 Understand how to implement and monitor planned preventative maintenance and emergency works	4.1 explain how to implement the maintenance programme 4.2 examine how to monitor the programme and address specific resources and performance issues and recommend appropriate action during the execution of the works 4.3 explain how to ensure the compliance of statutory requirements for the maintenance of both planned preventative and emergency works 4.4 explain how to ensure that accurate monitor records are maintained and retained			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 6: **Analyse and evaluate research data and provide within a surveying environment**

Unit reference number: H/601/8830

Level: 3

Credit value: 10

Guided learning hours: 30

Unit summary

This unit is about the different types of research methods, seeking feedback, and different methods for analysing information.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Obtaining information:
 - use discussion
 - use questioning
 - use research.
- 2 Methods and techniques:
 - desk research
 - field research.
- 3 Purpose:
 - showing information
 - increasing understanding
 - informing decisions.
- 4 Analysis and evaluation techniques:
 - qualitative
 - quantitative.

Learning outcomes 3 and 4

- 1 Provide information:
 - orally
 - in writing
 - graphically
 - electronically.
- 2 Purpose:
 - showing information
 - increasing understanding
 - informing decisions.
- 3 People receiving information and advice:
 - senior and junior colleagues
 - customers or clients
 - people outside your organisation.
- 4 Seek feedback:
 - use discussion
 - use questioning
 - use research.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Analyses of information which includes records of the analysis and evaluation techniques used and checks made

Simulations are not considered to be acceptable for producing evidence for this element.

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Summaries of information and advice provided
- 2 Record(s) of feedback (3.4) [3.1, 3.4]

Process evidence

- 1 Presenting information and advice

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to analyse and evaluate research data	<p>1.1 obtain information using appropriate methods and techniques which is sufficiently detailed for the purpose for which it is to be used</p> <p>1.2 record and store gathered information according to organisational systems and procedures</p> <p>1.3 select relevant, valid and reliable information for analysis</p> <p>1.4 apply analysis and evaluation techniques which are appropriate to the purpose of the research</p> <p>1.5 collate, record and analyse the information to produce accurate results and conclusions</p> <p>1.6 check the accuracy of the analysis using appropriate techniques and make adjustments where necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to analyse and evaluate research data	2.1 explain how to obtain information using appropriate methods and techniques which is sufficiently detailed for the purpose for which it is to be used 2.2 explain how to record and store gathered information according to organisational systems and procedures 2.3 evaluate how to select relevant, valid and reliable information for analysis 2.4 explain how to apply analysis and evaluation techniques which are appropriate to the purpose of the research 2.5 explain how to collate, record and analyse the information to produce accurate results and conclusions 2.6 explain how to check the accuracy of the analysis using appropriate techniques and make adjustments where necessary			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to provide information and advice	3.1 provide information and advice which is complete, summarised accurately and clearly relevant to the intended purpose 3.2 provide information and advice using a style of communication which is appropriate to the ability, knowledge and understanding of the people receiving information and advice 3.3 give advice which is consistent with the organisation's policy and procedures and resource constraints 3.4 seek feedback from recipients about information and advice you provide, and use this feedback to improve ways in which you give information and advice			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to provide information and advice	4.1 explain how to provide information and advice which is complete, summarised accurately and clearly relevant to the intended purpose 4.2 explain how to provide information and advice using a style of communication which is appropriate to the ability, knowledge and understanding of the people receiving information and advice 4.3 propose how to give advice which is consistent with the organisation's policy and procedures and resource constraints 4.4 explain how to seek feedback from recipients about information and advice you provide, and use this feedback to improve ways in which you give information and advice			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 7: Use technical information systems and information technology within a surveying environment

Unit reference number: A/601/8834

Level: 3

Credit value: 10

Guided learning hours: 30

Unit summary

This unit is about operating and using technical information systems using agreed procedures. You will need to provide technical information and advice to people using the system. It is also about making the most of IT systems to support project work.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Information:
 - property
 - organisational
 - technical reference.
- 2 Use (of information):
 - technical reference
 - current record
 - archive record
 - knowledge management
 - personal development (including Continuing Professional Development)
 - statutory and legal requirements (eg data protection).
- 3 Technical information:
 - paper based
 - electronic.

Learning outcomes 3 and 4

- 1 Software and IT systems:
 - spreadsheets
 - databases
 - word processing
 - presentation
 - proprietary
 - bespoke.
- 2 Sources:
 - other IT systems
 - manually created
 - within own organisation
 - outside own organisation
 - geographically remote.
- 3 Customers:
 - colleagues
 - company and project management
 - clients.
- 4 Security measures:
 - access rights to input
 - passwords
 - access rights to outputs
 - data consistency and back-up
 - recovery plans.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of information which has been classified and stored (1.1, 1.2) [1.1, 1.2, 1.3]
- 2 Record(s) of advice and guidance offered (1.3) [1.1, 1.2]

- 3 Record(s) of agreed procedures used to operate the technical information system (1.4) [1.3]
- 4 Record(s) of procedures operated for inputting, maintaining and archiving information (1.5) [1.1]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' `Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes		Assessment criteria	Evidence type	Portfolio reference	Date
1	Be able to use technical information systems and information technology	1.1 collate and organise information into a suitable form for reference and use 1.2 classify stored information so that it can be quickly identified and retrieved when needed 1.3 advise and offer guidance to people who need to find and use information 1.4 operate the technical information system using agreed procedures 1.5 operate appropriate and valid procedures for inputting, maintaining and archiving information			
2	Understand how to use technical information systems and information technology	2.1 explain how to collate and organise information into a suitable form for reference and use 2.2 explain how to classify stored information so that it can be quickly identified and retrieved when needed 2.3 propose how to advise and offer guidance to people who need to find and use information 2.4 explain how to operate the technical information system using agreed procedures 2.5 explain how to operate appropriate and valid procedures for inputting, maintaining and archiving information			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to apply information technology (IT) to projects	3.1 utilise the software and IT systems that are required to execute the project activities 3.2 handle, edit, format and check information and data obtained from a range of internal and external sources 3.3 extract, enter, and process information to produce the outputs required by customers 3.4 share your own skills and understanding to help others 3.5 implement the specified security measures to protect the confidentiality and integrity of project data held in IT systems			
4 Understand how to apply information technology (IT) to projects	4.1 explain how to utilise the software and IT systems that are required to execute the project activities 4.2 explain how to handle, edit, format and check information and data obtained from a range of internal and external sources 4.3 explain how to extract, enter, and process information to produce the outputs required by customers 4.4 explain how to share your own skills and understanding to help others 4.5 explain how to implement the specified security measures to protect the confidentiality and integrity of project data held in IT systems			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 8: Collect, analyse and present measured survey data within a surveying environment

Unit reference number: J/601/8836

Level: 3

Credit value: 18

Guided learning hours: 60

Unit summary

This Unit is concerned with preparing for, carrying-out and recording the results of a measured survey. The survey could be of any kind of building, land or the wider environment using measuring equipment.

You will need to prepare thoroughly for a survey, including for the choice of the correct equipment and for the due attention to safety. You will need to be able to undertake a measured survey with the required level of accuracy, record and present the results.

Assessment requirements/evidence requirements

Range

The following ranges apply:

Learning outcomes 1 and 2

- 1 Purpose of the survey:
 - land
 - building.
- 2 Survey - method:
 - visual inspection
 - measurement.
- 3 Arrangements:
 - permissions
 - access
 - personal health and safety
 - security.
- 4 Equipment:
 - mechanical
 - optical
 - electronic.

Learning Outcomes 3 and 4

- 1 Equipment:
 - mechanical
 - optical
 - electronic.
- 2 Circumstances and conditions:
 - situational
 - operational
 - unforeseen.
- 3 Survey type:
 - land
 - building.
- 4 Presenting:
 - orally
 - in writing
 - electronically.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of pre-work checks and confirmation of: the survey method statement; equipment and arrangements (1.1, 1.2, 1.3, 1.4) [ALL]
- 2 Record(s) of equipment checks and calibration (1.4, 1.5) [1.4]

Process evidence:

- 1 Checks and adjustment of equipment (1.5) [1.4]

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

1 Record(s) and report(s) including observations and measurements; survey data; problems; adaptations of work practices; restoration of the site

2 Analysis(es) of survey data [3.1, 3.2]

Process evidence

1 Taking observations and measurements recording survey data, adapting work procedures and practices (3.1, 3.2, 3.4, 3.5, 3.6)

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to contribute to the preparation of survey operations</p>	<p>1.1 confirm the objectives and purpose of the survey</p> <p>1.2 confirm with the people who will be affected that the survey method statement is accurate before starting the work</p> <p>1.3 check and confirm, before starting work, that all necessary arrangements have been made</p> <p>1.4 arrange for relevant equipment, and enough spares for on site maintenance, to be brought to the site and kept safely and securely</p> <p>1.5 check and adjust equipment so that it is accurate</p>			
<p>2 Understand how to contribute to the preparation of survey operations</p>	<p>2.1 explain how to confirm the objectives and purpose of the survey</p> <p>2.2 explain how to confirm with the people who will be affected that the survey method statement is accurate before starting the work</p> <p>2.3 explain how to check and confirm, before starting work, that all necessary arrangements have been made</p> <p>2.4 explain how to arrange for relevant equipment, and enough spares for on site maintenance, to be brought to the site and kept safely and securely</p> <p>2.5 explain how to check and adjust equipment so that it is accurate</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to assist in undertaking and presenting measured surveys	3.1 take accurate observations and measurements using valid methods and equipment to meet appropriate datum requirements 3.2 adapt work procedures and practices to allow for different circumstances and conditions 3.3 record survey data clearly and accurately and store it securely for later analysis 3.4 restore areas which have been opened for access so that subsequent processes can take place 3.5 assist in assembling and collecting survey data to allow an accurate analysis to be made 3.6 assist in checking and verifying the survey data to maintain accuracy and integrity 3.7 present the data analysis, the commentary and any supporting information accurately, clearly and in a suitable format for use			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to assist in undertaking and presenting measured surveys	4.1 evaluate how to take accurate observations and measurements using valid methods and equipment to meet appropriate datum requirements 4.2 explain how to adapt work procedures and practices to allow for different circumstances and conditions 4.3 explain how to record survey data clearly and accurately and store it securely for later analysis 4.4 explain how to restore areas which have been opened for access so that subsequent processes can take place 4.5 explain how to assist in assembling and collecting survey data to allow an accurate analysis to be made 4.6 explain how to assist in checking and verifying the survey data to maintain accuracy and integrity 4.7 explain how to present the data analysis, the commentary and any supporting information accurately, clearly and in a suitable format for use			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 9: Contribute to the preparation and processing of tender procurement within a surveying environment

Unit reference number: K/601/8845

Level: 3

Credit value: 14

Guided learning hours: 70

Unit summary

This unit is about agreeing with the line and an appropriate procurement process to ensure that tenderers meet the specification.

You will show that you have sent enquiries to potential suppliers and evaluated those who responded to the invitation against the agreed selection criteria.

You will also need to issue procurement documents to all the tenderers following the agreed procedures. You will need to contribute to the analysis of the selected tenders and notify successful tenderers.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Tender:
 - open competitive
 - negotiated.
- 2 Tenderers:
 - contractors
 - suppliers.
- 3 Requirements:
 - legal
 - statutory
 - EU guidelines.

- 4 Evidence:
 - documentary
 - references.
- 5 Selection criteria:
 - quality and delivery record
 - references from previous clients and bankers
 - conflict of interest
 - health and safety
 - resources (human, materials, facilities)
 - environmental policy and management
 - public liability insurance (contractors).

Learning Outcomes 3 and 4

- 1 Tender:
 - open competitive
 - negotiated.
- 2 Tenderers:
 - contractors
 - suppliers.
- 3 Requirements:
 - legal
 - statutory
 - EU guidelines.
- 4 Variations and information:
 - time
 - cost
 - quality.

Learning Outcomes 5 and 6

- 1 Tenders - type:
 - open competitive
 - negotiated.
- 2 Tenderers:
 - contractors
 - suppliers.
- 3 Requirements:
 - legal
 - statutory
 - EU guidelines.

4 Variations and information:

- time
- cost
- quality.

5 Criteria:

- competence of people
- quality
- technical variability
- timescales
- costs.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of tender documents, tender invitations and information from tenderers

Simulations are not considered to be acceptable for producing evidence for this element.

Process Evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Tender document(s) (3.1) [3.1, 3.2]
- 2 Record(s) of tender documents issued, feedback, any variations and information received from tenderers (3.2, 3.3, 3.4, 3.5)

Process evidence: not applicable

Learning outcome 5

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Records of checks and analyses of tenderers against agreed criteria and clarification of discrepancies
- 2 Record(s) of exchanges of information including variations (5.5, 5.6) [5.2, 5.4]
- 3 Record(s) of notifications to tenderers (5.7) [5.2]

Process Evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to contribute to evaluate and selecting potential tenderers	1.1 agree with the line manager the appropriate type of tender and the potential tenderers which meet the contract specification 1.2 determine how many tenders to invite, taking into account the value, size and complexity of the contract 1.3 send invitations to tender to potential tenderers, in accordance with statutory requirements, and invite them to provide evidence about their experience and capability 1.4 evaluate potential tenderers who respond to the invitation against the agreed selection criteria, and rank them in order and offer information to decision makers 1.5 confirm that the selected tenderers are willing to tender and revise the list of tenderers as necessary			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to contribute to evaluate and selecting potential tenderers	<p>2.1 evaluate how to agree with the line manager the appropriate type of tender and the potential tenderers which meet the contract specification</p> <p>2.2 evaluate how to determine how many tenders to invite, taking into account the value, size and complexity of the contract</p> <p>2.3 explain how to send invitations to tender to potential tenderers, in accordance with statutory requirements, and invite them to provide evidence about their experience and capability</p> <p>2.4 evaluate potential tenderers who respond to the invitation against the agreed selection criteria, and rank them in order and offer information to decision makers</p> <p>2.5 explain how to confirm that the selected tenderers are willing to tender and revise the list of tenderers as necessary</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to contribute to the obtaining of estimates, bids and tenders	3.1 contribute to the preparation of tender documents which meet statutory requirements and codes of practice 3.2 issue tender documents to all the tenderers on the agreed list, following the agreed procedures 3.3 respond to queries from tenderers promptly and pass on any additional variations and information which they need 3.4 investigate any errors, omissions and ambiguities reported by tenderers and assist with amending the tender documents 3.5 maintain accurate records of tender documents issued, feedback, variations and information received from tenderers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to contribute to the obtaining of estimates, bids and tenders	4.1 explain how to contribute to the preparation of tender documents which meet statutory requirements and codes of practice 4.2 explain how to issue tender documents to all the tenderers on the agreed list, following the agreed procedures 4.3 explain how to respond to queries from tenderers promptly and pass on any additional variations and information which they need 4.4 examine how to investigate any errors, omissions and ambiguities reported by tenderers and assist with amending the tender documents 4.5 explain how to maintain accurate records of tender documents issued, feedback, variations and information received from tenderers			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to contribute to the assessment and selection of successful tenders and negotiation of changes	5.1 ensure the safe keeping and opening of the tenders received in line with organisation's procedures and legal requirements 5.2 contribute to the selection of those tenders which meet the criteria and reject those that do not 5.3 check tenders for accuracy and clarify any discrepancies 5.4 contribute to the analysis of selected tenders against agreed criteria in order to identify the most appropriate 5.5 identify and clarify in writing variations and information with relevant tenderers 5.6 inform line manager of variations and information to support any negotiations 5.7 prepare the formal acceptance letter and notify tenderers who have been unsuccessful			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Understand how to contribute to the assessment and selection of successful tenders and negotiation of changes	6.1 explain how to ensure the safe keeping and opening of the tenders received in line with organisation's procedures and legal requirements 6.2 explain how to contribute to the selection of those tenders which meet the criteria and reject those that do not 6.3 explain how to check tenders for accuracy and clarify any discrepancies 6.4 explain how to contribute to the analysis of selected tenders against agreed criteria in order to identify the most appropriate 6.5 describe how to identify and clarify in writing variations and information with relevant tenderers 6.6 explain how to inform line manager of variations and information to support any negotiations 6.7 explain how to prepare the formal acceptance letter and notify tenderers who have been unsuccessful			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 10: Prepare procurement programmes and schedules of work within a surveying environment

Unit reference number: T/601/8847

Level: 3

Credit value: 14

Guided learning hours: 30

Unit summary

This unit is about preparing programmes and schedules and calculating resource requirements and monitoring progress and dealing with deviations from plans.

You will need to produce detailed, accurate schedules, allowing for anticipated contingencies, in an appropriate agreed format.

You will need to identify activities, calculate the resources and time requirements, analyse the activities and produce activity programmes and schedules. You will need to implement monitoring systems and identify alterations and justify them to the line manager.

Assessment requirements/evidence requirements

The following ranges apply

Learning outcomes 1 and 2

- 1 Scope of the project:
 - contract conditions
 - time and sequencing
 - cost
 - quantitative and qualitative objectives
 - construction and installation requirements.
- 2 Range of services:
 - materials
 - construction
 - plant and equipment
 - services.
- 3 Programmes:
 - bar charts
 - network analysis

- critical path
 - action lists
 - method statements.
- 4 Presenting:
- orally
 - in writing
 - graphically
 - electronically.
- 5 Specific considerations:
- working arrangements
 - staging of payments
 - schedule of deliveries
 - obligations to third parties
 - statutory obligations and approvals.

Learning Outcomes 3 and 4

- 1 Resources:
- consultants
 - plant and equipment
 - materials and components
 - sub-contractors
 - site.
- 2 Scope of the project
- contract conditions
 - time and sequencing
 - quantitative and qualitative objectives
 - construction and installation requirements.
- 3 Programmes:
- bar charts
 - network analysis
 - critical path
 - action lists
 - method statements.
- 4 Project requirements:
- contract conditions
 - cost and timescale
 - statutory consent
 - third party obligations
 - health and safety best practice.

- 5 External factors:
- other related programmes
 - supply lead times
 - seasonal weather conditions
 - statutory limitations
 - site conditions.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Schedule(s) of work which include the scope of the project, the range of services, specific considerations and any agreed amendments (All) [All]
- 2 System for monitoring works programmes (1.6) [1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Draft works programme(s) (3.1) [3.1, 3.2, 3.3]
- 2 Detailed programme(s) incorporating, methods, resource calculations and systems and reviews of progress and external factors (3.1, 3.2, 3.3, 3.4, 3.5) [All]
- 3 Identified alterations to works programme(s) (3.6) [3.3]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare a schedule of work	1.1 collate information and identify the scope of the project 1.2 prepare schedules of work which contain a complete statement of the scope of the project and of the range of services required 1.3 produce detailed programmes of planned activities which are consistent with the complexity of the project 1.4 draft the schedules of work in a format which is appropriate to the type and scope of the project 1.5 present the schedules of work to line manager addressing any specific considerations and agree amendments 1.6 develop a system for monitoring the works programmes 1.7 present the schedules of work to stakeholders, correct any inconsistencies and agree amendments 1.8 present information clearly and accurately and reach agreement using a style and approach which maintains goodwill and trust			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to prepare a schedule of work	2.1 explain how to collate information and identify the scope of the project 2.2 explain how to prepare schedules of work which contain a complete statement of the scope of the project and of the range of services required 2.3 explain how to produce detailed programmes of planned activities which are consistent with the complexity of the project 2.4 explain how to draft the schedules of work in a format which is appropriate to the type and scope of the project 2.5 explain how to present the schedules of work to line manager and address any specific considerations and agree amendments 2.6 propose how to develop a system for monitoring the works programmes 2.7 explain how to present the schedules of work to stakeholders, correct any inconsistencies and agree amendments 2.8 explain how to present information clearly and accurately and reach agreement using a style and approach which maintains goodwill and trust			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to programming and implementation of the project	3.1 identify activities, calculate the resources needed from the scope of the project and prepare a draft work programme 3.2 evaluate alternative methods, resources and systems, in order to select a solution to meet project requirements and inform line manager 3.3 calculate how long each activity will take, identify activities which influence each other and sequence them logically and realistically so that they make the best use of the resources available 3.4 monitor and review progress against project requirements 3.5 identify and evaluate significant external factors and inform line manager 3.6 identify alterations to the works programmes to meet any changed circumstances and justify them to the line manager			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to programme and implementation of the project	4.1 describe how to identify activities, calculate the resources needed from the scope of the project and prepare a draft work programme 4.2 evaluate alternative methods, resources and systems, in order to select a solution to meet project requirements and inform line manager 4.3 explain how to calculate how long each activity will take, identify activities which influence each other and sequence them logically and realistically so that they make the best use of the resources available 4.4 examine how to monitor and review progress against project requirements 4.5 describe how to identify and evaluate significant external factors and inform line manager 4.6 describe how to identify alterations to the works programmes to meet any changed circumstances and justify them to the line manager			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 11: Contribute to the co-ordination of site preparation and work programme within a surveying environment

Unit reference number: A/601/8848

Level: 3

Credit value: 13

Guided learning hours: 40

Unit summary

This unit is about contributing to the preparation of a site for the work to be carried out and obtaining all the necessary resources.

You will need to identify all the factors such as safety, access, public utilities, layout and security that will affect the work on site and contribute to the necessary arrangements to satisfy them.

You will need to review and clarify project information and communicate the programme to relevant people. You will also need to organise and control resources to meet project requirements.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

1 Information:

- survey reports
- design
- statutory consents
- health and safety plan
- method statements
- programme.

2 Special considerations:

- occupiers
- adjoining owners
- public access
- site conditions
- environmental considerations
- access.

- 3 Risk factors:
 - site conditions
 - statutory regulations and limitations
 - codes of practice
 - health, safety and welfare
 - environment
 - hazards
 - heritage status.
- 4 Project:
 - new build
 - infrastructure
 - demolition
 - extension
 - alteration
 - refurbishment
 - temporary works
 - installation.
- 5 Site layout:
 - storage
 - temporary accommodation
 - work areas
 - plant
 - temporary services
 - access
 - security
 - continuing use by occupiers.

Learning outcomes 3 and 4

- 1 Information:
 - survey reports
 - design
 - statutory consents
 - health and safety plan
 - method statements
 - programme.
- 2 Resources:
 - people
 - plant and equipment
 - materials and components
 - sub-contractors
 - information.

3 Special requirements relating to:

- occupiers
- environmental considerations
- vehicular access
- health and safety
- hazards
- adjoining owners
- access
- site conditions
- statutory regulations and limitations
- codes of practice
- sequencing
- elimination of waste
- regulations
- heritage status.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of confirmed special considerations, and risk factors which might compromise the project (1.1, 1.2, 1.3) [1.2, 1.3, 1.4]
- 2 Record(s) of plans and arrangements for site layout, access points for site and works, site safety and security and layout for operational purposes (1.4, 1.5, 1.6, 1.7) [1.3, 1.5]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of reviewed, clarified and updated project plan information (3.1) [3.1]

- 2 Written notice of contract programme and integrated programmes of works (3.2, 3.3) [3.1]
- 3 Record(s) of site control which includes resources, special requirements contingency plans and communicated changes (3.4, 3.5, 3.6, 3.7) [3.2, 3.3]

Process evidence:

- 1 Organising and controlling the site (3.6) [3.2]

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to contribute to the co-ordination of site preparation	1.1 review relevant information which was used in the preparation of the project programme and clarify and update it for production plan purposes 1.2 confirm any needs arising from special considerations and record, communicate and accommodate them 1.3 recognise any risk factors which might compromise the project and pass on the information to the line manager 1.4 identify access points for the site and works and acknowledge the site layout 1.5 provide accurate details about the project to the utility and emergency services 1.6 contribute to arrangements for adequate site safety and security before and during site activities 1.7 contribute to the plan of the site layout for operational purposes and communicate planned information to appropriate site staff			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to contribute to the co-ordination of site preparation	2.1 examine how to review relevant information which was used in the preparation of the project programme and clarify and update it for production plan purposes 2.2 explain how to confirm any needs arising from special considerations and record, communicate and accommodate them. 2.3 describe how to recognise any risk factors which might compromise the project and pass on the information to the line manager 2.4 describe how to identify access points for the site and works and acknowledge the site layout 2.5 explain how to provide accurate details about the project to the utility and emergency services 2.6 explain how to contribute to arrangements for adequate site safety and security before and during site activities 2.7 explain how to contribute to the plan of the site layout for operational purposes and communicate planned information to appropriate site staff			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to co-ordinate work programmes on site	3.1 review of relevant project programme information and clarify and update it as required 3.2 provide written notice regarding contract programme to all relevant parties 3.3 communicate and agree on integrated programme of works to all relevant parties 3.4 review the needs of special requirements and prepare contingency plans to minimise disruption to the project and those likely to be affected by the works programme 3.5 communicate changes arising from the contingency plan to the relevant parties 3.6 organise and control the site and resources so that conditions comply with health and safety and security requirements, the site is tidy and creates a favourable image of the organisation and the project 3.7 identify, communicate and monitor necessary consequent actions and responsibilities for implementation			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to co-ordinate work programmes on site	4.1 examine how to review on relevant project programme information and clarify and update it as required 4.2 explain how to provide written notice regarding contract programme to all relevant parties 4.3 explain how to communicate and agree on integrated programme of works to all relevant parties 4.4 examine how to review the needs of special requirements and prepare contingency plans to minimise disruption to the project and those likely to be affected by the works programme 4.5 explain how to communicate changes arising from the contingency plan to the relevant parties 4.6 explain how to organise and control the site and resources so that conditions comply with health and safety and security requirements, the site is tidy and creates a favourable image of the organisation and the project 4.7 describe how to identify, communicate and monitor necessary consequent actions and responsibilities for implementation			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 12: Monitor works within a surveying environment

Unit reference number: F/601/8849

Level: 3

Credit value: 15

Guided learning hours: 30

Unit summary

You will need to implement control systems to monitor performance and collect, use and present information. You will need to identify and investigate variations and recommend corrective action. You will also need to identify improvements and make recommendations regarding them.

You will need to implement monitoring systems, identify deviations from plans and, following investigation, implement appropriate corrective action.

You will also need to inspect and check work against contract requirements, record variations. You will need to review the cost of corrective work with the people involved in the contract and record any decisions.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Performance:
 - quality of work
 - programme
 - cost
 - health
 - safety
 - environmental impact.
- 2 Standards:
 - statutory requirements
 - project specifications
 - British and International Standards
 - Codes of Practice
 - organisation standards

- trade advisory guidance and best practice
- benchmarks.

3 Systems:

- visual inspection
- comparison with performance standards
- testing
- site inspection reports
- contractors reports
- site meetings
- certified payments
- written, graphical and electronic records of actual work against programmed work
- organisational procedures.

Learning Outcomes 3 and 4

1 Systems:

- visual inspection
- comparison and benchmarking with performance standards
- site inspection reports
- contractors' reports
- site meetings
- certified payments
- written, graphical and electronic records of actual work against programmed work
- organisational procedures
- resource records.

2 Programmes:

- bar charts
- critical path
- action lists
- method statements.

3 Corrective action:

- restore progress in accordance with agreed programme;
- agree new completion dates
- securing additional resources
- altering planned work
- contract administrator/supervising officer instructions.

4 Relevant people:

- colleagues
- customer, clients or users
- people outside your organisation.

Learning outcomes 5 and 6

1 Project documents - relating to:

- contract criteria
- costs
- schedules of rates
- purchase order
- quantity
- quality
- progress
- as built data.

2 People:

- colleagues
- customer, clients or users
- people outside your organisation.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of identified performance standards and specified responsibilities (1.1, 1.2) [1.1, 1.2]
- 2 Record(s) of systems for inspection and control which include checks, work failing requirements and corrective action (1.3, 1.4, 1.5, 1.6) [1.1, 1.2, 1.3]
- 3 Record(s) of information referred to others which include(s) notifications to line managers about conflicting standards or performance variations recommended improvements from feedback and amendments to performance standards (1.6, 1.7, 1.8, 1.9) [1.1, 1.2, 1.3]

Process evidence

- 1 Checking work (1.4, 1.5) [1.1, 1.2]

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Progress monitoring and recording system(s) including record(s) which include collected and summarised information (3.1, 3.2) [3.1, 3.2]
- 2 Record(s) of identified and quantified deviations, and agreed corrective action (3.2, 3.3, 3.4) [3.2, 3.3, 3.4]
- 3 Record(s) of information and recommendations and improvements from feedback (3.2, 3.4, 3.5, 3.6) [3.3, 3.4]

Process evidence: not applicable

Learning outcome 5

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of the preparation of documents for certification which include checks, variations, inspections of work and decisions about the liability for the costs of corrective and additional work (5.1, 5.2, 5.3) [5.1, 5.2]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process evidence:

- 1 Inspecting and checking work (5.2)

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to monitor works against agreed performance standards</p>	<p>1.1 identify and interpret performance standards from available information and pass them to people responsible for their implementation, before they start work</p> <p>1.2 specify, clearly and unambiguously, the responsibilities which individuals have for maintaining performance standards</p> <p>1.3 implement systems for inspecting and controlling the quality of performance standards</p> <p>1.4 check, regularly, that work conforms to the specified performance standards and record the outcomes</p> <p>1.5 identify any work which fails to meet the requirements and specified performance standards and instigate corrective action</p> <p>1.6 check that corrective action is taken and notify the appropriate line manager if this is not done within a reasonable time</p> <p>1.7 inform the appropriate line manager about conflicting standards or performance variations and suggest the decisions which need making and actions which need taking</p> <p>1.8 identify improvements from feedback received and recommend them to the line manager</p> <p>1.9 recommend amendments to the performance standards and record them accurately</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>2 Understand how to monitor works against agreed performance standards</p>	<p>2.1 describe how to identify and interpret performance standards from available information and pass them to people responsible for their implementation, before they start work</p> <p>2.2 evaluate how to specify, clearly and unambiguously, the responsibilities which individuals have for maintaining performance standards</p> <p>2.3 explain how to implement systems for inspecting and controlling the quality of performance standards</p> <p>2.4 explain how to check, regularly, that work conforms to the specified performance standards and record the outcomes</p> <p>2.5 describe how to identify any work which fails to meet the requirements and specified performance standards and instigate corrective action</p> <p>2.6 explain how to check that corrective action is taken and notify the appropriate line manager if this is not done within a reasonable time</p> <p>2.7 explain how to inform the appropriate line manager about conflicting standards or performance variations and suggest the decisions which need making and actions which need taking</p> <p>2.8 describe how to identify improvements from feedback received and recommend them to the line manager</p> <p>2.9 propose how to recommend amendments to the performance standards and record them accurately</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to monitor progress against agreed programmes	3.1 implement systems to monitor and record the progress of the contract against the agreed programmes 3.2 collect information regularly and summarise it accurately 3.3 identify, quantify and investigate any deviations from planned progress which may have occurred 3.4 receive and review proposals for corrective action against performance standards 3.5 agree with relevant people the preferred options for corrective action 3.6 identify improvements from feedback received and recommend them to relevant people			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to monitor progress against agreed programmes	4.1 explain how to implement systems to monitor and record the progress of the contract against the agreed programmes 4.2 explain how to collect information regularly and summarise it accurately 4.3 describe how to identify, quantify and investigate any deviations from planned progress which may have occurred 4.4 explain how to receive and review proposals for corrective action against performance standards 4.5 evaluate how to agree with relevant people the preferred options for corrective action 4.6 describe how to identify improvements from feedback received and recommend them to relevant people			
5 Be able to inspect and check work for completion	5.1 obtain all the relevant documents needed for certification, check them against the contract requirements, record any variations and review the documents for a certification decision to be made 5.2 inspect and check work against the contract requirements, record any variations and review for satisfactory completion 5.3 review the liability for the costs of corrective and additional work, discuss this with the people involved in the contract and record decisions to meet the contract requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Understand how to inspect and check work for completion	6.1 explain how to obtain all the relevant documents needed for certification, check them against the contract requirements, record any variations and review the documents for a certification decision to be made 6.2 examine how to inspect and check work against the contract requirements, record any variations and review for satisfactory completion 6.3 examine how to review the liability for the costs of corrective and additional work, discuss this with the people involved in the contract and record decisions to meet the contract requirements			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 13: Control income and expenditure within a surveying environment

Unit reference number: A/601/8851

Level: 3

Credit value: 13

Guided learning hours: 30

Unit summary

This unit is about drafting budgets and agreeing that budget with management. The second standard is about methods to monitor spend.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

1 Budget headings:

- income
- expenditure.

2 Method:

- forecasts
- cash flow.

3 Variances:

- overspend
- underspend.

Learning outcomes 3 and 4

1 Income:

- income
- fees
- rent
- service charges.

2 Expenditure:

- capital
- revenue
- recoverable

- non-recoverable
- VAT.

3 Records may be:

- manual
- electronic.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Draft budget with available information and justification (1.1, 1.2) [1.1]
- 2 Methods for maintaining overall control of the budget (1.3) [1.1, 1.2]
- 3 Record(s) of method(s) and timescales agreed for re-forecasting and reporting contingencies and variances (1.4) [1.2, 1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Records of verification of actual expenditure (3.1, 3.2) [3.1, 3.2]
- 2 Record(s) of income due, payments received and receipts issued (All) [All]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' `Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare and agree budgets	1.1 gather and evaluate available information and prepare a draft budget 1.2 submit and justify the draft budget with line manager and agree a final budget 1.3 confirm and implement an appropriate method of maintaining overall control of the budget 1.4 identify and agree appropriate methods and timescales for re-forecasting and reporting contingencies and variances			
2 Understand how to prepare and agree budgets	2.1 explain how to gather and evaluate available information and prepare a draft budget 2.2 explain how to submit and justify the draft budget with line manager and agree a final budget 2.3 explain how to confirm and implement an appropriate method of maintaining overall control of the budget 2.4 describe how to identify and agree appropriate methods and timescales for re-forecasting and reporting contingencies and variances			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to evaluate how to manage and implement budgets	3.1 specify and agree how income receipts and expenditure will be made against budget 3.2 record and verify actual expenditure 3.3 record information about income due and received 3.4 keep records and receipts which support expenditure 3.5 produce clear, accurate accounts for payments at agreed stages			
4 Understand how to evaluate how to manage and implement budgets	4.1 evaluate how to specify and agree how income receipts and expenditure will be made against budget 4.2 explain how to record and verify actual expenditure 4.3 explain how to record information about income due and received 4.4 explain how to keep records and receipts which support expenditure 4.5 explain how to produce clear, accurate accounts for payments at agreed stages			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 14: Manage contract cost control within a surveying environment

Unit reference number: H/601/8858

Level: 3

Credit value: 16

Guided learning hours: 60

Unit summary

This unit is about controlling quantities and costs, monitoring costs against budgets and dealing with interim and final accounts.

Assessment requirements/evidence requirements

Range

The following ranges apply:

Learning outcomes 1 and 2

- 1 Cash flow:
 - income
 - expenditure.
- 2 Variances:
 - overspend
 - underspend.
- 3 Taxation:
 - VAT
 - income tax.

Learning Outcomes 3 and 4

- 1 Contract quantities and cost control systems:
 - contractual procedures
 - operational procedures
 - electronic record.
- 2 Quantities and cost data:
 - materials
 - plant
 - sub-contractors
 - dayworks
 - periodic valuations

- retention sums
- forecasts of expenditure
- contract programme and progress.

Learning outcomes 5 and 6

- 1 Valuing work in progress:
 - verified information sources
 - contract valuations
 - variations
 - adjustments and allowances made
 - materials on site
 - materials off site
 - retention.
- 2 Valuing completed contract work:
 - verified information sources
 - contract valuations
 - variations
 - adjustments and allowances made
 - retention.
- 3 Variations:
 - costs
 - quantity
 - quality
 - programme
 - reimbursement for loss and expense.
- 4 Claims - resulting from:
 - measurement
 - valuation of variations
 - loss and expense arising from breaches of contract.
- 5 Background information:
 - sub-contractor payment proof
 - invoices
 - warranties
 - signed final account statement by contractors.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Records of performance against budgets including reconciliation and reports of actual income and expenditure performance (1.1, 1.6) [1.1]
- 2 Records of cash flow and periodic reforecasts of income and expenditure performance against budget (1.2, 1.3) [1.1]
- 3 Records of investigations of variances and action taken (1.4) [1.2]
- 4 Actions and amendments to budgets (1.5) [1.2]
- 5 Information provided for taxation and audit purposes (1.7) [1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Contract cost control system(s) which include records of quantities and cost data collection, calculations of work values, quantities and cost data (3.1, 3.2, 3.3, 3.4, 3.5, 3.6) [3.1, 3.2]
- 2 Identified costed and recommended opportunities for cost savings which have been (3.7) [3.1, 3.2]

Process evidence: not applicable

Learning outcome 5

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Valuation(s), back-up information and calculations which include the value of work in progress to the final cost, pricing and referencing quantities, values of variations and claims (All) [All]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to update budget and cash flow against variances and contingencies	1.1 monitor actual performance against budgets 1.2 monitor cash flow against actual income and expenditure 1.3 prepare periodic reforecasts based on actual income and expenditure performance against budget 1.4 investigate variances and take action promptly to correct and maintain the budget 1.5 inform interested parties about actions which will require the amending of budgets 1.6 reconcile and report actual income and expenditure performance against budget within agreed timescales 1.7 provide all relevant information for taxation and audit purposes			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to update budget and cash flow against variances and contingencies	2.1 examine how to monitor actual performance against budgets 2.2 examine how to monitor cash flow against actual income and expenditure 2.3 explain how to prepare periodic reforecasts based on actual income and expenditure performance against budget 2.4 examine how to investigate variances and take action promptly to correct and maintain the budget 2.5 explain how to inform interested parties about actions which will require the amending of budgets 2.6 describe how to reconcile and report actual income and expenditure performance against budget within agreed timescales 2.7 explain how to provide relevant information for taxation and audit purposes			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to control contract quantities and costs	3.1 implement appropriate contract quantities and cost control systems which are able to provide early warning of problems 3.2 collect quantities and cost data regularly, record it correctly and pass it on to the line manager 3.3 calculate the correct work values and quantities and cost data from estimates of work quantity and payment rates 3.4 prepare accurate quantities and cost data and present it in a format which will help line manager to make decisions 3.5 identify variations and trends in quantities and cost data and quantify and cost them 3.6 investigate any variations thoroughly and recommend appropriate action to the line manager 3.7 identify opportunities for cost savings and recommend them to the line manager			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to control contract quantities and costs	4.1 explain how to implement appropriate contract quantities and cost control systems which are able to provide early warning of problems 4.2 explain how to collect quantities and cost data regularly, record it correctly and pass it on to the line manager 4.3 explain how to calculate the correct work values and quantities and cost data from estimates of work quantity and payment rates 4.4 explain how to prepare accurate quantities and cost data and present it in a format which will help line manager to make decisions 4.5 describe how to identify variations and trends in quantities and cost data and quantify and cost them 4.6 examine how to investigate any variations thoroughly and recommend appropriate action to the line manager 4.7 describe how to identify opportunities for cost savings and recommend them to the line manager			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to contribute to the preparation and issue of recommendations for interim valuations and final accounts preparation	5.1 value work in progress, and agree the calculations with contractors involved in the contract 5.2 price and reference the quantities used in valuations so that they meet contract provisions 5.3 value both variations and claims from relevant information in accordance with the most appropriate contract provisions 5.4 prepare and submit accurate valuations, claims and final accounts which contain relevant background information and clarify and justify areas of potential disagreement 5.5 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 5.6 ascertain the final cost of the works executed under the terms and conditions of the contract			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Understand how to contribute to the preparation and issue of recommendations for interim valuations and final accounts preparation	<p>6.1 examine how to value work in progress, and agree the calculations with contractors involved in the contract</p> <p>6.2 examine how to price and reference the quantities used in valuations so that they meet contract provisions</p> <p>6.3 examine how to value both variations and claims from relevant information in accordance with the most appropriate contract provisions</p> <p>6.4 explain how to prepare and submit accurate valuations, claims and final accounts which contain relevant background information and clarify and justify areas of potential disagreement</p> <p>6.5 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</p> <p>6.6 explain how to ascertain the final cost of the works executed under the terms and conditions of the contract</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 15: Prepare information relevant to dispute resolution within a surveying environment

Unit reference number: Y/601/8873

Level: 3

Credit value: 12

Guided learning hours: 40

Unit summary

This unit is about collating information relevant to a dispute and summarising the main points. You will need to be able to produce conclusions and recommendations. It is also about producing case materials and submitting materials and responses within time limits.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

1 Information which is relevant to the dispute:

- contract documents
- correspondence
- instructions
- contract records
- technical reports
- witness testimony
- other evidential material
- expert opinion
- statutes.

2 Dispute:

- property
- construction
- contracts
- valuation.

Learning outcomes 3 and 4

1 Sources of information:

- contract documents

- correspondence
- instructions
- contract records
- technical reports
- case summaries
- research and test sources
- standards and codes of practice
- witnesses
- colleagues
- statutes.

2 Dispute:

- property
- construction
- contracts
- valuation.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Summary(ies) of evaluation(s) of the information about the dispute which include clarifications and comparisons with similar cases (1.1, 1.2, 1.3, 1.4, 1.7) [1.1, 1.2]
- 2 Record(s) of notification where expert advice is required (1.5, 1.6, 1.7) [1.1, 1.2]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Summary(ies) of investigation(s) (3.1) [3.1, 3.2]
- 2 Case materials which include assessed documents, examination of existing cases and precedents (3.3, 3.4, 3.5) [3.1, 3.2]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to summarise information relevant to a dispute</p>	<p>1.1 collate information which is relevant to the dispute, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it</p> <p>1.2 obtain information about similar cases, identify key points and common features and produce an accurate summary</p> <p>1.3 obtain enough additional information to make a valid evaluation in instances where the information is incomplete</p> <p>1.4 identify information which will support the case and summarise and justify it in a reasoned argument</p> <p>1.5 notify decision makers in cases where expert interpretation and judgement is required</p> <p>1.6 produce justifiable conclusions and recommendations for further action and pass them to the people involved in the dispute</p> <p>1.7 disclose information which is relevant to the dispute only to those who have a right to see it</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to summarise information relevant to a dispute	<p>2.1 explain how to collate information which is relevant to the dispute, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it</p> <p>2.2 explain how to obtain information about similar cases, identify key points and common features and produce an accurate summary</p> <p>2.3 explain how to obtain enough additional information to make a valid evaluation in instances where the information is incomplete</p> <p>2.4 describe how to identify information which will support the case and summarise and justify it in a reasoned argument</p> <p>2.5 explain how to notify decision makers in cases where expert interpretation and judgement is required</p> <p>2.6 explain how to produce justifiable conclusions and recommendations for further action and pass them to the people involved in the dispute</p> <p>2.7 explain how to disclose information which is relevant to the dispute only to those who have a right to see it</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to produce evidence for submission	3.1 investigate sources of information that are relevant to the dispute and summarise valid, reliable and relevant information 3.2 assess documents for relevance, confirm that they are valid and summarise them accurately 3.3 examine existing cases and precedents, select relevant examples and include them into the background materials and evaluation criteria 3.4 produce case materials which are complete and contain valid, reliable and accurate information 3.5 follow agreed procedures and meeting time limits for submitting written materials and responses			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to produce evidence for submission	4.1 examine how to investigate sources of information that are relevant to the dispute and summarise valid, reliable and relevant information 4.2 examine how to assess documents for relevance, confirm that they are valid and summarise them accurately 4.3 examine existing cases and precedents, select relevant examples and include them into the background materials and evaluation criteria 4.4 explain how to produce case materials which are complete and contain valid, reliable and accurate information 4.5 explain how to follow agreed procedures and meet time limits for submitting written materials and responses			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 16: Measure and draft bills of quantities within a surveying environment

Unit reference number: H/601/8844

Level: 3

Credit value: 18

Guided learning hours: 80

Unit summary

This unit is about preparing draft bills of quantities. You will need to assemble and collate design information and identify which categories of work require measurement. You will need to measure dimensions and quantities in a way which conforms to relevant standard methods.

You will need to collate the quantities and descriptions and prepare a draft bill and obtain necessary checks and approvals and advise the line manager.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

1 Information:

- drawings
- schedules
- specifications
- information about the contract and allocation of risks and responsibilities
- quotations
- records of queries raised and answers
- standard methods of measurement
- technical literature.

2 Measurement - relates to:

- trade
- elemental
- operational

- approximate
 - schedules of rates.
- 3 How to measure dimensions and quantities methodically:
- manual
 - electronic.
- 4 Intended purpose:
- procurement
 - contract
 - production.

Learning Outcomes 3 and 4

- 1 Type:
- trade
 - elemental
 - operational/activity.
- 2 Format:
- firm
 - approximate
 - schedule of rates.
- 3 Procurement:
- competitive tender - limited competition
 - open competition (including advertising)
 - non-competitive negotiation
 - serial award.
- 4 Producing:
- manual
 - electronic.
- 5 Checks and approvals:
- format
 - presentation
 - accuracy
 - technical content
 - completeness
 - referencing
 - cross-referencing and correlation with associated documents
 - status.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Measured quantities and descriptions which include identified categories of work, standard methods and phraseology, accuracy of information, checks (All) [All]

Simulations are not considered to be acceptable for producing evidence for this Element

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Bill(s) which include: collated and sequenced quantities and descriptions; changes; draft provisional sums and contingencies, preliminaries; checks and approvals (All) [All]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to prepare and measure quantities	1.1 assemble and collate information and identify which categories of work require measurement 1.2 review information to decide how to measure dimensions and quantities methodically and in a way which conforms to relevant conventions, standard methods and phraseology 1.3 identify any information which is incomplete and inconsistent and obtain accurate amendments 1.4 recommend what action to take where measurement is inappropriate or impossible 1.5 measure the quantities and prepare descriptions accurately, collate and sequence them correctly and present them in a way which meets their intended purpose 1.6 check the accuracy of information received and produced			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to prepare and measure quantities	<p>2.1 explain how to assemble and collate information and identify which categories of work require measurement</p> <p>2.2 examine how to review information to decide how to measure dimensions and quantities methodically and in a way which conforms to relevant conventions, standard methods and phraseology</p> <p>2.3 describe how to identify any information which is incomplete and inconsistent and obtain accurate amendments</p> <p>2.4 propose how to recommend what action to take where measurement is inappropriate or impossible</p> <p>2.5 explain how to measure the quantities and prepare descriptions accurately, collate and sequence them correctly and present them in a way which meets their intended purpose</p> <p>2.6 explain how to check the accuracy of information received and produced</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to contribute to the preparation of bills of quantities	3.1 confirm with line manager the type and format of bills of quantities for the type of procurement to be adopted 3.2 collate the quantities and descriptions, produce them in a recognised form and sequence them so that they can be included in the documentation 3.3 include within the quantities and descriptions, changes, clarifications and corrections arising from the source documents and the brief 3.4 prepare draft forecasted provisional sums and contingencies so that they can be included in the bills of quantities 3.5 prepare a draft bill of preliminaries for approval by line manager 3.6 obtain necessary checks and approvals and advise line manager			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to contribute to the preparation of bills of quantities	4.1 explain how to confirm with line manager the type and format of bills of quantities for the type of procurement to be adopted 4.2 explain how to collate the quantities and descriptions, produce them in a recognised form and sequence them so that they can be included in the documentation 4.3 explain how to include within the quantities and descriptions, changes, clarifications and corrections arising from the source documents and the brief 4.4 explain how to prepare draft forecasted provisional sums and contingencies so that they can be included in the bills of quantities 4.5 explain how to prepare a draft bill of preliminaries for approval by line manager 4.6 explain how to obtain necessary checks and approvals and advise line manager			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 17: Contribute to and process property agreements within a surveying environment

Unit reference number: L/601/8868

Level: 3

Credit value: 14

Guided learning hours: 50

Unit summary

This unit is about contributing to the negotiation of property agreements and inputting instructions to legal documents which constitute a property agreement.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Client:
 - public
 - private.
- 2 Agreements:
 - transactions
 - options
 - rent reviews
 - deeds of variation
 - licences.
- 3 Course of action:
 - legal advice
 - arbitration
 - adjudication
 - independent expert
 - abandon the transaction
 - further negotiation.

Learning Outcomes 3 and 4

1 Agreements:

- transactions
- options
- rent review
- deeds of variation
- licences.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Agreement(s) and records of offers, negotiations and consultations with the client against agreed heads of terms (1.1, 1.2, 1.3, 1.5, 1.7) [1.1]
- 2 Course of action agreed which include timescales (1.4) [1.1, 1.2, 1.3]
- 3 Record(s) of points of disagreement and recommendation(s) (1.6) [1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Instruction(s) provided to the legal representatives preparing documents (3.1) [3.1]
- 2 Record(s) of legal documents for agreements checked and amended where necessary (3.2, 3.3) [3.1]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF

- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to contribute to the process of negotiating property agreements	1.1 acknowledge and confirm client's instructions 1.2 clarify the agreements and record the client's requirements 1.3 advise and recommend a course of action to meet the client's requirements 1.4 advise the client about the process and likely timescale for the transactions 1.5 negotiate offers which are likely to be acceptable to the client and obtain written confirmation of all offers 1.6 identify a failure to agree, record the points of disagreement and recommend an appropriate course of action 1.7 prepare a letter of agreement, accurately record the agreed heads of terms for the line manager's approval			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to contribute to the process of negotiating property agreements	2.1 explain how to acknowledge and confirm client's instructions 2.2 explain how to clarify the agreements and record the client's requirements 2.3 propose how to advise and recommend a course of action to meet the client's requirements 2.4 propose how to advise the client about the process and likely timescale for the transactions 2.5 propose how to negotiate offers which are likely to be acceptable to the client and obtain written confirmation of all offers 2.6 describe how to identify a failure to agree, record the points of disagreement and recommend an appropriate course of action 2.7 explain how to prepare a letter of agreement, accurately record the agreed heads of terms for the line manager's approval			
3 Be able to prepare instructions to complete property agreements	3.1 provide accurate instructions to the legal representatives preparing legal documents 3.2 check that the legal documents for agreements meet the requirements and are consistent with the instructions given 3.3 recommend amendments to documents in cases where the legal documents do not meet the requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to prepare instructions to complete property agreements	4.1 explain how to provide accurate instructions to the legal representatives to prepare legal documents 4.2 explain how to check that the legal documents for agreements meet the requirements and are consistent with the instructions given 4.3 propose how to recommend amendments to documents in cases where the legal documents do not meet the requirements			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Learning outcomes 3 and 4

1 Criteria:

- planned use
- actual or estimated income
- size
- location
- current use
- legal and regulatory constraints
- age
- condition
- appearance
- access
- proximity to facilities
- cost
- financial return.

2 Investigating:

- contact current owner/agent
- contact with legal/regulatory bodies.

3 Detailed investigations:

- surveys
- legal and regulatory
- financial.

Learning outcomes 5 and 6

1 Instructions:

- choice of property
- method of acquisition
- relevant constraints
- limits of authority.

2 Factors:

- surveys
- legal and regulatory
- financial
- plans
- approvals.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of client's instructions, requirements and preferences (1.1, 1.2, 1.3) [1.1, 1.2]
- 2 Records of advice given on current market trends (1.3) [1.1, 1.2]
- 3 Record(s) of identified and recommended methods for acquiring property, the process and likely timescale for acquiring property (1.4, 1.5) [1.1, 1.2, 1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Evaluation(s) of property relevant to the client's requirements which includes obtained information, criteria for evaluation, selected properties, investigations on property (3.1, 3.2, 3.3, 3.4) [3.1, 3.2, 3.3]
- 2 Property information presented to clients including advice about detailed investigations (3.5, 3.6, 3.7) [3.1, 3.2, 3.3]

Process evidence: not applicable

Learning outcome 5

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of client instructions (5.1) [5.1]
- 2 Offer(s) prepared, submitted, negotiated, confirmed and renegotiated (5.2, 5.3) [5.1, 5.2]
- 3 Agreed heads of terms (5.4) [5.1]
- 4 Record(s) of monitoring and managing the transaction and relevant factors (5.5) [5.1, 5.2]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to identify and confirm client's property acquisition requirements	1.1 acknowledge and confirm client's instructions 1.2 clarify, confirm and record the client's detailed requirements and preferences 1.3 review and advise the client of the current market conditions and the likelihood of their requirements being fulfilled 1.4 identify and recommend suitable methods for acquiring property 1.5 confirm with the client the process and likely timescale for acquiring property 1.6 acknowledge and confirm client's instructions 1.7 clarify, confirm and record the client's detailed requirements and preferences 1.8 review and advise the client of the current market conditions and the likelihood of their requirements being fulfilled 1.9 identify and recommend suitable methods for acquiring property 1.10 confirm with the client the process and likely timescale for acquiring property			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to identify and confirm client's property acquisition requirements	2.1 explain how to acknowledge and confirm client's instructions 2.2 explain how to clarify, confirm and record the client's detailed requirements and preferences 2.3 examine how to review and advise the client of the current market conditions and the likelihood of their requirements being fulfilled 2.4 describe how to identify and recommend suitable methods for acquiring property 2.5 explain how to confirm with the client the process and likely timescale for acquiring property			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to evaluate and report on property acquisition options	3.1 develop and agree with the client criteria to evaluate property that may meet the client's requirements 3.2 identify and obtain property particulars which meet the client's requirements 3.3 select and rank properties which potentially meet the client's requirements 3.4 investigate the highest ranking properties to establish whether they are still available, any conditions applying to acquisition and any relevant constraints 3.5 present the client with clear and accurate information about properties which best meet the criteria 3.6 agree with the client which properties are to be inspected and arrange a timetable of visits 3.7 advise the client about more detailed investigations which may be appropriate before the acquisition decision is made			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to evaluate and report on property acquisition options	4.1 propose how to develop and agree with the client criteria for evaluating property that may meet the client's requirements 4.2 describe how to identify and obtain property particulars which meet the client's requirements 4.3 evaluate how to select and rank properties which potentially meet the client's requirements 4.4 examine how to investigate the highest ranking properties to establish whether they are still available, any conditions applying to acquisition and any relevant constraints 4.5 explain how to present the client with clear and accurate information about properties which best meet the criteria 4.6 evaluate how to agree with the client which properties are to be inspected and arrange a timetable of visits 4.7 propose how to advise the client about more detailed investigations which may be appropriate before the acquisition decision is made			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to negotiate and complete a property acquisition	5.1 take and confirm the client's further instructions 5.2 negotiate, prepare and submit an offer in accordance with the client's instructions and current legal requirements 5.3 renegotiate the offer, with the client's authority, where the offer is not accepted 5.4 confirm the agreed heads of terms, promptly and in writing 5.5 monitor and manage the transaction and relevant factors in the interests of the client			
6 Understand how to negotiate and complete a property acquisition	6.1 explain how to take and confirm the client's further instructions 6.2 propose how to negotiate, prepare and submit an offer in accordance with the client's instructions and current legal requirements 6.3 propose how to renegotiate the offer, with the client's authority, where the offer is not accepted 6.4 explain how to confirm the agreed heads of terms, promptly and in writing 6.5 examine how to monitor and manage the transaction and relevant factors in the interests of the client			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 19: Progress property disposals within a surveying environment

Unit reference number: F/601/8866

Level: 3

Credit value: 16

Guided learning hours: 50

Unit summary

The unit is about the selling of property either as an agent, or for an employer, and includes the methods of sale and marketing, production of detail sheets and other marketing material, dealing with buyers and offers and negotiating a sale.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning Outcomes 1 and 2

- 1 Clients:
 - public
 - private.
- 2 Methods of disposal:
 - sales
 - surrenders
 - lettings
 - licences.
- 3 Marketing methods:
 - brochures
 - media advertising
 - promotions and events
 - internet.

Learning outcomes 3 and 4

- 1 Property details:
 - title and tenure
 - location and description
 - accommodation

- services and facilities
- fixtures and fittings
- consents and approvals
- certificates.

Learning outcomes 5 and 6

- 1 Prospective buyers:
 - public
 - private.
- 2 Assessing a buyer's ability to fund an acquisition:
 - discussions with the potential purchaser
 - references
 - credit and covenant rating
 - funding.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of information obtained which include client's instructions and detailed requirements (1.1, 1.2) [1.1]
- 2 Records of methods of disposal and marketing methods (1.3, 1.4) [1.1, 1.2]
- 3 Record(s) of timescales and, marketing methods, for completing the disposal and other potential actions (1.5, 1.6, 1.7) [1.1, 1.2, 1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Property details produced and agreed which include sales and marketing material (3.1, 3.3, 3.4) [3.1]

- 2 Record(s) of advice given on keeping, removing or replacing items at the property and the actions to be taken to maintain the security and condition of property (3.2, 3.5) [3.1]

Process evidence: not applicable

Learning outcome 5

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of property details provided (5.1) [5.1, 5.2]
- 2 Record(s) showing properties matched to prospective buyers and occupiers which include viewings and evaluations and advice on offers and bids received (5.3, 5.4, 5.5, 5.6) [5.1, 5.2]
- 3 Assessment(s) of buyer's ability to fund the acquisition (5.6) [5.2]
- 4 Records of agreed terms for disposal (5.7, 5.8) [5.1, 5.2]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to identify and agree client's requirements	1.1 acknowledge and confirm client's instructions 1.2 clarify, agree and record client's detailed requirements 1.3 review the current market conditions and advise clients and recommend on methods of disposal which are likely to achieve the client's objectives on the best terms available 1.4 advise and recommend marketing methods appropriate for the property, market conditions and budget 1.5 advise the clients of the process and likely timescale for implementing and completing a disposal and of any statutory obligations necessary to effect the disposal 1.6 agree with the clients suitable marketing methods to promote the property and dates and methods to review progress 1.7 identify other potential actions which the clients might take to promote the disposal of the property			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to identify and agree client's requirements	2.1 explain how to acknowledge and confirm client's instructions 2.2 explain how to clarify, agree and record client's detailed requirements 2.3 examine how to review the current market conditions and advise clients and recommend on methods of disposal which are likely to achieve the client's objectives on the best terms available 2.4 propose how to advise and recommend marketing methods appropriate for the property, market conditions and budget 2.5 propose how to advise the clients of the process and likely timescale for implementing and completing a disposal and of any statutory obligations necessary to effect the disposal 2.6 evaluate how to agree with the clients suitable marketing methods to promote the property and dates and methods to review progress 2.7 describe how to identify other potential actions which the clients might take to promote the disposal of the property			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to prepare individual properties for disposal	3.1 record relevant and accurate property details and agree them with the client 3.2 advise the client on keeping, removing or replacing items at the property to show it to its best advantage and recommend any issues that need to be rectified to achieve a successful disposal 3.3 agree and produce suitable sales and promotional information about the property which is appropriate to the type of transaction, which conforms with legal requirements and which is likely to attract potential buyers 3.4 prepare and produce sales and marketing material of the property for distribution to interested parties and potential buyers 3.5 agree arrangements for inspecting the property with interested parties and advise occupiers on the actions to be taken to maintain security and to safeguard the condition of the property			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to prepare individual properties for disposal	<p>4.1 explain how to record relevant and accurate property details and agree them with the client</p> <p>4.2 propose how to advise the client on keeping, removing or replacing items at the property to show it to its best advantage and recommend any issues that need to be rectified to achieve a successful disposal</p> <p>4.3 evaluate how to agree and produce suitable sales and promotional information about the property which is appropriate to the type of transaction, which conforms with legal requirements and which is likely to attract potential buyers</p> <p>4.4 explain how to prepare and produce sales and market material of the property for distribution to interested parties and potential buyers</p> <p>4.5 evaluate how to agree arrangements for inspecting the property with interested parties and advise occupiers on the actions to be taken to maintain security and to safeguard the condition of the property</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
5 Be able to promote the disposal of properties	5.1 release and issue appropriate marketing information and details of the property which are likely to meet prospective buyer's requirements 5.2 process and record all enquiries received from interested parties 5.3 contact prospective buyers and occupiers and explain the potential suitability of property to meet their requirements 5.4 obtain feedback about suitability of property and pass the information on, promptly, to the client 5.5 arrange appointments to view and advise prospective buyers and occupiers 5.6 evaluate and advise the client on all offers and bids received and assess the buyer's ability to fund the acquisition before taking the client's further instructions 5.7 negotiate, where necessary, with selected parties to agree terms for the disposal of the property in accordance with the client's instructions and current legal requirements 5.8 maintain complete and accurate records relating to the disposal of the property and only disclose information to people who have a right to have it			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
6 Understand how to promote the disposal of properties	<p>6.1 explain how to release and issue appropriate marketing information and details of the property which are likely to meet prospective buyer's requirements</p> <p>6.2 explain how to process and record all enquiries received from interested parties</p> <p>6.3 explain how to contact prospective buyers and occupiers and explain the potential suitability of property to meet their requirements</p> <p>6.4 explain how to obtain feedback about suitability of property and pass the information on, promptly, to the client</p> <p>6.5 explain how to arrange appointments to view and advise prospective buyers and occupiers</p> <p>6.6 evaluate and advise the client on all offers and bids received and assess the buyer's ability to fund the acquisition before taking the client's further instructions</p> <p>6.7 propose how to negotiate, where necessary, with selected parties to agree terms for the disposal of the property in accordance with the client's instructions and current legal requirements</p> <p>6.8 explain how to maintain complete and accurate records relating to the disposal of the property and disclose information only to people who have a right to have it</p>			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 20: Contribute to the appraisal and valuation of property within a surveying environment

Unit reference number: J/601/8870

Level: 3

Credit value: 18

Guided learning hours: 70

Unit summary

The unit is about contributing to the valuation/appraisal process. This involves the gathering of comparable evidence, analysing this and applying it to the valuation/appraisal, and preparing valuation/appraisal reports, for a range of purposes, to required Red Book standards. This unit is also about having the knowledge of all valuation methods and techniques.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Information - sources:
 - client instructions
 - statutory basis and assumptions
 - precedent case law
 - investigations (contextual, market, economic, plan, legal and regulatory factors)
 - energy performance certificates.
- 2 Appraisal and valuation:
 - sale
 - purchase
 - letting
 - accounting
 - insurance
 - taxation.
- 3 Valuation methods and techniques:
 - comparison
 - discounted cash flow
 - residual

- investment
- contractor's methods
- receipts and expenditure.

Learning outcomes 3 and 4

- 1 Appraisal and valuation:
 - sale
 - purchase
 - letting
 - accounting
 - insurance
 - taxation.
- 2 Report:
 - legal and statutory requirement
 - defined by the client.
- 3 Relevant factors:
 - condition
 - specialist reports
 - plan
 - energy performance of the building.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of valuation methods and techniques which have been selected and which include collated information and confirmation of consents and permissions (1.1, 1.2, 1.3, 1.8) [1.1, 1.2, 1.3]
- 2 Record(s) of observations and measurements (1.4, 1.8) [1.2]
- 3 Valuation preparation which include reviews of documents and evidence (1.5, 1.6, 1.7, 1.8) [1.1, 1.2, 1.3]

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Appraisal and valuation reports which include the valuation, relevant factors, checks, explanations and judgments (All) [All]
- 2 Internal record(s) (3.5) [3.1]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>1 Be able to prepare a valuation</p>	<p>1.1 collate the information needed for the appraisal and valuation</p> <p>1.2 confirm that the appropriate consents and permissions have been obtained prior to valuation</p> <p>1.3 select valuation methods and techniques which are appropriate to the type of property and which meet the requirements of professional standards and codes of practice</p> <p>1.4 take accurate measurements and make observations which are necessary for the appraisal and valuation and record them to meet agreed formats</p> <p>1.5 review all relevant documents to meet the requirements of the appraisal and valuation process</p> <p>1.6 select evidence for assessing value which is accurate, complete and relevant</p> <p>1.7 analyse all the relevant evidence and information, and prepare a realistic valuation which can be used to make sound and justifiable assumptions and judgements and provide advice</p> <p>1.8 keep internal records which are clear, accurate and complete, and which conform to accepted professional and statutory requirements</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to prepare a valuation	2.1 explain how to collate the information needed for the appraisal and valuation 2.2 explain how to confirm that the appropriate consents and permissions have been obtained prior to valuation 2.3 evaluate how to select valuation methods and techniques which are appropriate to the type of property and which meet the requirements of professional standards and codes of practice 2.4 explain how to take accurate measurements and make observations which are necessary for the appraisal and valuation and record them to meet agreed formats 2.5 examine how to review all relevant documents to meet the requirements of the appraisal and valuation process 2.6 evaluate how to select evidence for assessing value which is accurate, complete and relevant 2.7 examine how to analyse all the relevant evidence and information, and prepare a realistic valuation which can be used to make sound and justifiable assumptions and judgements and provide advice 2.8 explain how to keep internal records which are clear, accurate and complete, and which conform to accepted professional and statutory requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
3 Be able to prepare and present appraisal and valuation reports	3.1 prepare a complete and accurate appraisal and valuation report specifying the valuation, qualified by any relevant factors and which conforms to relevant codes of practice and standards 3.2 check that the appraisal and valuation report is accurate, complete and meets the client's instructions 3.3 prepare a statement to justify the judgements made in arriving at the valuation 3.4 present the report for approval by the line manager and clarify any questions which the client asks about the valuation 3.5 keep internal records which are clear, accurate and complete, and which conform to accepted professional and statutory requirements			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
4 Understand how to prepare and present appraisal and valuation reports	4.1 explain how to prepare a complete and accurate appraisal and valuation report to specify the valuation, qualified by any relevant factors and which conforms to relevant codes of practice and standards 4.2 explain how to check that the appraisal and valuation report is accurate, complete and meets the client's instructions 4.3 explain how to prepare a statement to justify the judgements made in arriving at the valuation 4.4 explain how to present the report for approval by the line manager and clarify any questions which the client asks about the valuation 4.5 explain how to keep internal records which are clear, accurate and complete, and which conform to accepted professional and statutory requirements			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Unit 21: Develop and implement property management plan within a surveying environment

Unit reference number: L/601/8871

Level: 3

Credit value: 14

Guided learning hours: 50

Unit summary

This unit is about managing property on behalf of clients or an employer for the purpose of maximising returns to the client/employer. This area of work is diverse and can include day-to-day management of property, maintenance considerations, decisions about refurbishment/redevelopment, consideration of user requirements, forward planning for user changes/space allocation changes, compliance with environmental and legislative changes.

Assessment requirements/evidence requirements

Range

The following ranges apply

Learning outcomes 1 and 2

- 1 Information:
 - client's instructions
 - drawings, plans and surveys
 - legal documents
 - user requirements
 - other records.
- 2 Property management plans:
 - operational
 - transactions
 - maintenance
 - redevelopment and/or refurbishment
 - quality service standards.
- 3 Criteria:
 - financial
 - specific asset initiatives

- occupancy rates
- redevelopment
- compliance.

Learning outcomes 3 and 4

- 1 Client's objectives:
 - asset enhancement
 - financial considerations
 - occupational requirements
 - environmental issues
 - legislative
 - health and safety
 - timing.
- 2 Criteria:
 - financial considerations
 - specific asset initiatives
 - occupancy levels
 - redevelopment refurbishment
 - compliance issues.
- 3 Users:
 - owner
 - occupier
 - tenant
 - third parties.

Taken as a whole, the evidence must show that the candidate consistently meets all the assessment criteria, across the ranges for the Element.

Performance evidence

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.

Learning outcome 1

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Client's instructions, information relevant to a property management plan including assessment criteria, justifications and assumptions. (All)
[All]

Simulations are not considered to be acceptable for producing evidence for this Element.

Process evidence: not applicable

Learning outcome 3

Product evidence

The candidate must produce documentary evidence from the workplace covering the following item(s) that are considered to be common and key/critical to demonstrating competence.

- 1 Record(s) of property management plan which includes special considerations and client's objectives and reviews against criteria (3.1, 3.2, 3.5, 3.8) [All]
- 2 Record(s) of reviews of the market needs for space and services and user requirements (3.3, 3.7) [3.1]
- 3 Records of identified and evaluated opportunities for allocating space and services which reflect market demand and user needs (3.4) [3.3]
- 4 Recommendations to line manager (3.6) [3.1, 3.3]

Process evidence: not applicable

This unit must be assessed in a work environment and in accordance with the:

- Additional requirements for qualifications using the title NVQs in QCF
- ConstructionSkills' 'Consolidated Assessment Strategy for Construction and the Built Environment Craft, Supervisory, Technical, Managerial and Professional units and qualifications with NVQ in the Qualification and Credit Framework (QCF) title and SVQs'.

Assessment recording

This unit is assessed in the workplace or in conditions resembling the workplace. Learners can enter the types of evidence they are presenting for assessment and the submission date against each assessment criterion. Alternatively, centre documentation should be used to record this information.

Learning outcomes and assessment criteria

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
1 Be able to evaluate options and select property management objectives and plans	1.1 confirm and clarify the client's instructions for the management of the property 1.2 gather and verify information from relevant sources to assist in the preparation of a property management plan which is consistent with the client's instructions 1.3 evaluate and assess the information obtained and prepare a draft property management plan for the approval of the line manager 1.4 prepare appropriate criteria to assess and measure the performance of the property management plan 1.5 present and recommend a realistic property management plan together with a rationale to support and justify the assumptions made for the approval of the line manager			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
2 Understand how to evaluate options and select property management objectives and plans	2.1 explain how to confirm and clarify the client's instructions for the management of the property 2.2 explain how to gather and verify information from relevant sources to assist in the preparation of a property management plan which is consistent with the client's instructions 2.3 evaluate and assess the information obtained and prepare a draft property management plan for the approval of the line manager 2.4 explain how to prepare appropriate criteria to assess and measure the performance of the property management plan 2.5 explain how to present and recommend a realistic property management plan together with a rationale to support and justify the assumptions made for the approval of the line manager			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>3 Be able to implement the property management plan and identify asset management opportunities</p>	<p>3.1 communicate the approved property market plan to all relevant parties for their information and indicate any special considerations and/or limitations</p> <p>3.2 implement proactively the property management plan in accordance with the client's objectives</p> <p>3.3 review the market needs for space and services and update and maintain accurate records of user requirements</p> <p>3.4 identify and evaluate asset management opportunities for allocating space and services which reflect market demand and user needs</p> <p>3.5 prepare appropriate criteria upon which to advise and recommend implement asset management initiatives which meet the client's objectives</p> <p>3.6 assess the implications of implement asset management initiatives and make recommendations to the line manager where such opportunities are likely to add value and/or meet the client's objectives</p> <p>3.7 implement agreed asset management initiatives in accordance with instructions, allocate space and services to users to fulfil the client's objectives</p> <p>3.8 monitor the performance of the property management plan against the criteria and advise the line manager of any variations</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
<p>4 Understand how to implement the property management plan and identify asset management opportunities</p>	<p>4.1 explain how to communicate the approved property market plan to all relevant parties for their information and indicate any special considerations and/or limitations</p> <p>4.2 explain how to implement proactively the property management plan in accordance with the client's objectives</p> <p>4.3 examine how to review the market needs for space and services and update and maintain accurate records of user requirements</p> <p>4.4 explain how to identify and evaluate asset management opportunities for allocating space and services which reflect market demand and user needs</p> <p>4.5 explain how to prepare appropriate criteria upon which to advise and recommend implement asset management initiatives which meet the client's objectives</p> <p>4.6 examine how to assess the implications of implement asset management initiatives and make recommendations to the line manager where such opportunities are likely to add value and/or meet the client's objectives</p>			

Learning outcomes	Assessment criteria	Evidence type	Portfolio reference	Date
	4.7 explain how to implement agreed asset management initiatives in accordance with instructions, allocate space and services to users to fulfil the client's objectives 4.8 examine how to monitor the performance of the property management plan against the criteria and advise the line manager of any variations			

Learner name: _____

Date: _____

Learner signature: _____

Date: _____

Assessor signature: _____

Date: _____

Internal verifier signature: _____

Date: _____

(if sampled)

Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *Pearson Edexcel NVQs, SVQs and competence-based qualifications – Delivery Requirements and Quality Assurance Guidance* (Pearson)

All of these publications are available on our website: qualifications.pearson.com

Further information and publications on the delivery and quality assurance of NVQ/Competence-based qualifications are available at our website on the Delivering BTEC pages. Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please go to the resources page of our website.

How to obtain National Occupational Standards

To obtain the National Occupational Standards go to www.ukstandards.org.uk

Professional development and training

Pearson supports UK and international customers with training related to NVQ and BTEC qualifications. This support is available through a choice of training options offered in our published training directory or through customised training at your centre.

The support we offer focuses on a range of issues including:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing student-centred learning and teaching approaches
- building functional skills into your programme
- building effective and efficient quality assurance systems.

The national programme of training we offer can be viewed on our website (qualifications.pearson.com). You can request customised training through the website or by contacting one of our advisers in the Training from the Pearson team via Customer Services to discuss your training needs.

The training we provide:

- is active
- is designed to be supportive and thought provoking
- builds on best practice
- may be suitable for those seeking evidence for their continuing professional development.

Annexe A: Quality assurance

Key principles of quality assurance

- A centre delivering Pearson qualifications must be a Pearson recognised centre and must have approval for qualifications that it is offering.
- The centre agrees, as part of gaining recognition, to abide by specific terms and conditions relating to the effective delivery and quality assurance of assessment. The centre must abide by these conditions throughout the period of delivery.
- Pearson makes available to approved centres a range of materials and opportunities to exemplify the processes required for effective assessment and provide examples of effective standards. Approved centres must use the guidance on assessment to ensure that staff who are delivering Pearson qualifications are applying consistent standards.
- An approved centre must follow agreed protocols for: standardisation of assessors; planning, monitoring and recording of assessment processes; internal verification and recording of internal verification processes and dealing with special circumstances, appeals and malpractice.

Quality assurance processes

The approach to quality assured assessment is made through a partnership between a recognised centre and Pearson. Pearson is committed to ensuring that it follows best practice and employs appropriate technology to support quality assurance processes where practicable. The specific arrangements for working with centres will vary. Pearson seeks to ensure that the quality assurance processes it uses do not inflict undue bureaucratic processes on centres, and works to support them in providing robust quality assurance processes.

The learning outcomes and assessment criteria in each unit within this specification set out the standard to be achieved by each learner in order to gain each qualification. Pearson operates a quality assurance process, designed to ensure that these standards are maintained by all assessors and verifiers.

For the purposes of quality assurance, all individual qualifications and units are considered as a whole. Centres offering these qualifications must be committed to ensuring the quality of the units and qualifications they offer, through effective standardisation of assessors and internal verification of assessor decisions. Centre quality assurance and assessment processes are monitored by Pearson.

The Pearson quality assurance processes will involve:

- gaining centre recognition and qualification approval if a centre is not currently approved to offer Pearson qualifications
- annual visits to centres by Pearson for quality review and development of overarching processes and quality standards. Quality review and development visits will be conducted by a Pearson quality development reviewer
- annual visits by occupationally competent and qualified Pearson Standards Verifiers for sampling of internal verification and assessor decisions for the occupational sector
- the provision of support, advice and guidance towards the achievement of National Occupational Standards.

Centres are required to declare their commitment to ensuring quality and appropriate opportunities for learners that lead to valid and accurate assessment outcomes. In addition, centres will commit to undertaking defined training and online standardisation activities.

Annexe B: Centre certification and registration

Pearson Standards Verifiers will provide support, advice and guidance to centres to achieve Direct Claims Status (DCS). Pearson will maintain the integrity of Pearson NVQs through ensuring that the awarding of these qualifications is secure. Where there are quality issues identified in the delivery of programmes, Pearson will exercise the right to:

- direct centres to take action
- limit or suspend certification
- suspend registration.

The approach of Pearson in such circumstances is to work with the centre to overcome the problems identified. If additional training is required, Pearson will aim to secure the appropriate expertise to provide this.

What are the access arrangements and special considerations for the qualification in this specification?

Centres are required to recruit learners to Pearson qualifications with integrity.

Appropriate steps should be taken to assess each applicant's potential and a professional judgement should be made about their ability to successfully complete the programme of study and achieve the qualification. This assessment will need to take account of the support available to the learner within the centre during their programme of study and any specific support that might be necessary to allow the learner to access the assessment for the qualification. Centres should consult Pearson's policy on learners with particular requirements.

Pearson's policy on access arrangements and special considerations for Pearson qualifications aims to enhance access to the qualifications for learners with disabilities and other difficulties (as defined by the Equality Act 2010) without compromising the assessment of skills, knowledge, understanding or competence. Please refer to *Access Arrangements and Special Considerations for BTEC and Pearson NVQ Qualifications* for further details qualifications.pearson.com.

Annexe C: Assessment strategy

The ConstructionSkills Assessment Strategy will be available on the Pearson website, alongside the full specification on the Construction NVQ/Competence page.

Annexe D: Additional requirement for qualifications that use the term 'NVQ' in a QCF qualification title

Please go to www.ofqual.gov.uk to access the document '*Operating rules for using the term 'NVQ' in a QCF qualification title*'.

December 2017

For information about Edexcel, BTEC or LCCI qualifications visit qualifications.pearson.com

BTEC is a registered trademark of Pearson Education Limited

**Pearson Education Limited. Registered in England and Wales No. 872828
Registered Office: 80 Strand, London WC2R 0RL.
VAT Reg No GB 278 537121**