



**Level 3 NVQ Diploma in**

**Town Planning Technical Support**

**Qualification Specification**

Qualification Recognition Number: 600/7031/6

ABBE Qualification Code: DipTPTSL312

**April 2019**

## Why this document is being revised

This document has been revised by ABBE in April 2019. A summary of the changes made to this document is, as follows:

- New address added to 1.4

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# 1. ABBE

## 1.1 Introduction

ABBE, the Awarding Body for Building Education is a forward thinking organisation that offers a range of apprenticeships, qualifications, benefits and support.

ABBE is regulated by Ofqual for the delivery of a range of qualifications. Our qualifications are nationally recognised helping learners to achieve their full potential and ambitions.

The full range of qualifications can be found on our website <http://www.abbega.co.uk>

## 1.2 Our values, vision and mission

### **Our Values: Quality through Standards**

Our aim is to provide a high quality experience by building a strong community of mutual support and trust. We can use our collective talents to build meaningful partnerships to help us all to achieve our goals. ABBE is a recognised Awarding Organisation with strong professional integrity.

### **Our Vision:**

Is that every learner is confident, successful and has the opportunity to achieve their full potential.

### **Our Mission:**

ABBE Educates, inspires and empowers learners

## 1.3 Qualification Specification

This is the ABBE Qualification Specification for the ABBE Level 3 NVQ Diploma in Town Planning Technical Support. The aim of this specification is to provide learners and centres with information about the content of this qualification.

This specification is a live document and, as such, will be updated when required.

Additional qualification details are available for ABBE approved centres in the ABBE qualification handbook.

## 1.4 Enquiries

Any enquiries relating to this qualification should be addressed to:

ABBE  
Birmingham City University  
University House  
15 Bartholomew Row  
Birmingham  
B5 5JU

Telephone: 0121 331 5174  
Email: [abbeenquiries@bcu.ac.uk](mailto:abbeenquiries@bcu.ac.uk)  
Website: [www.abbega.co.uk](http://www.abbega.co.uk)



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## 2. Qualification Information

### 2.1 Qualification Purpose

The ABBE Level 3 NVQ Diploma in Town Planning Technical Support (QCF) is a competence based qualification that recognises the skills of those that may be working in town planning as support staff for local authorities and other public organisations, or as approved inspectors or working in private sector consultancies.

They may be working for local authorities and other public organisations, or as approved inspectors or working in private sector consultancies. These qualifications provide a means of recognising the competence of members of the practitioner in general and are aimed primarily at support staff.

### 2.2 Who could take this Qualification?

This qualification has been designed for people working in the field of town planning (including spatial planning, development management and enforcement activities) in a variety of support roles. This may involve dealing with a variety of tasks whether submitting or assessing applications, or advising and or organising projects.

### 2.3 Qualification Number

ABBE Level 3 NVQ Diploma in Town Planning Technical Support: 600/7031/6

### 2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 3

### 2.5 Total Qualification Time

This qualification is allocated Total Qualification Time (TQT) this includes Guided Learning (GL) expressed in hours, which indicates the number of hours of supervised or directed study time and assessment. Credit has also be allocated to this qualification.

- The Total Qualification Time (TQT) for this qualification is: 700
- Guided Learning (GL) for this qualification is: 200
- Credit Value: 70 credits

### 2.6 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

- Encouraging individuals to develop skills and enhance development and promotion prospects Enabling existing individuals who work in the field of built environment development and control to gain a
- recognised qualification and enhance their depth and breadth of knowledge
- Providing a route for new entrants into the industry to develop a discipline focused qualification which can
- provide the foundation for enhanced learning and development
- Attracting learners from outside the industry
- Allowing individuals with qualifications in other fields to retrain in this discipline



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## 2.7 Age ranges

|        |     |
|--------|-----|
| Pre 16 | No  |
| 16-18  | Yes |
| 18+    | Yes |
| 19+    | Yes |

## 2.8 Structure of the Qualification

### Pathway 1 - Spatial Planning

To achieve the ABBE Level 3 NVQ Diploma in Town Planning Technical Support (Spatial Planning) learners must achieve the five mandatory units and a minimum of two optional units.

| Mandatory Units |  |              |       |
|-----------------|--|--------------|-------|
| URN             | Unit Name  | Credit Value | Level |
| Y/504/4718      | Organise consultation and community engagement in planning or conservation   | 8            | 3     |
| R/504/4524      | Work in a team in planning, conservation or building control   | 10           | 3     |
| A/504/4534      | Carry out an environmental survey in planning, conservation or building control  | 15           | 3     |
| K/504/4562      | Operate technical information systems in planning, conservation or building control  | 10           | 3     |
| H/504/4561      | Operate in a professional manner in planning, conservation or building control   | 10           | 3     |
| Optional Units  |  |              |       |
| A/504/4548      | Provide technical support in planning, conservation or building control  | 12           | 3     |
| J/504/4519      | Process applications to secure grant and other funding in planning or conservation   | 8            | 3     |
| A/504/4520      | Prepare applications grant and other funding in planning or conservation   | 9            | 4     |
| F/504/5421      | Process and consult on applications to reflect statutory and policy requirements in planning, conservation or building control | 14           | 3     |
| D/504/4719      | Identify and monitor compliance of developments in planning, conservation or building control                                  | 14           | 3     |
| Y/504/4721      | Carry out measured survey in planning, conservation or building control  | 15           | 3     |
| J/504/4567      | Compile and present survey data in planning or building control  | 12           | 3     |
| J/504/4570      | Investigate and assess regulatory factors affecting potential developments in planning, conservation or building control       | 12           | 3     |
| L/504/4571      | Prepare graphical information in Planning, conservation or building control  | 11           | 3     |
| R/504/4572      | Process information relevant to breaches of regulation in planning, conservation or building control                           | 10           | 3     |



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|            |  |    |   |
|------------|--|----|---|
| F/504/4566 | Prepare applications and appeals to secure approvals and statutory consent in planning or conservation | 12 | 3 |
| M/504/4563 | Identify low carbon energy sources in planning, conservation or building control                       | 14 | 3 |
| D/504/4560 | Prepare for and participate in meetings in planning, conservation or building control                  | 10 | 3 |

## Pathway 2 - Development Management

To achieve the ABBE Level 3 NVQ Diploma in Town Planning Technical Support (Development Management) learners must achieve the five mandatory units and a minimum of two optional units.

| Mandatory Units |  |              |       |
|-----------------|--|--------------|-------|
| URN             | Unit Name  | Credit Value | Level |
| A/504/4548      | Provide technical support in planning, conservation or building control  | 12           | 3     |
| F/504/5421      | Process and consult on applications to reflect statutory and policy requirements in planning, conservation or building control | 14           | 3     |
| R/504/4524      | Work in a team in planning, conservation or building control   | 10           | 3     |
| K/504/4562      | Operate technical information systems in planning, conservation or building control  | 10           | 3     |
| H/504/4561      | Operate in a professional manner in planning, conservation or building control   | 10           | 3     |
| Optional Units  |  |              |       |
| Y/504/4718      | Organise consultation and community engagement in planning or conservation   | 8            | 3     |
| J/504/4519      | Process applications to secure grant and other funding in planning or conservation   | 8            | 3     |
| A/504/4520      | Prepare applications grant and other funding in planning or conservation   | 9            | 4     |
| D/504/4719      | Identify and monitor compliance of developments in planning, conservation or building control                                  | 14           | 3     |
| Y/504/4721      | Carry out measured survey in planning, conservation or building control  | 15           | 3     |
| A/504/4534      | Carry out an environmental survey in planning, conservation or building control  | 15           | 3     |
| J/504/4567      | Compile and present survey data in planning or building control  | 12           | 3     |
| J/504/4570      | Investigate and assess regulatory factors affecting potential developments in planning, conservation or building control       | 12           | 3     |
| L/504/4571      | Prepare graphical information in Planning, conservation or building control  | 11           | 3     |



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|            |  |    |   |
|------------|--|----|---|
| R/504/4572 | Process information relevant to breaches of regulation in planning, conservation or building control   | 10 | 3 |
| F/504/4566 | Prepare applications and appeals to secure approvals and statutory consent in planning or conservation | 12 | 3 |
| M/504/4563 | Identify low carbon energy sources in planning, conservation or building control                       | 14 | 3 |
| D/504/4560 | Prepare for and participate in meetings in planning, conservation or building control                  | 10 | 3 |

### Pathway 3 - Planning Enforcement

To achieve the ABBE Level 3 NVQ Diploma in Town Planning Technical Support (Planning Enforcement) learners must achieve the five mandatory units and a minimum of two optional units.

| Mandatory Units |  |              |       |
|-----------------|--|--------------|-------|
| URN             | Unit Name  | Credit Value | Level |
| D/504/4719      | Identify and monitor compliance of developments in planning, conservation or building control                                  | 14           | 3     |
| R/504/4524      | Work in a team in planning, conservation or building control   | 10           | 3     |
| R/504/4572      | Process information relevant to breaches of regulation in planning, conservation or building control                           | 10           | 3     |
| K/504/4562      | Operate technical information systems in planning, conservation or building control  | 10           | 3     |
| H/504/4561      | Operate in a professional manner in planning, conservation or building control   | 10           | 3     |
| Optional Units  |  |              |       |
| Y/504/4718      | Organise consultation and community engagement in planning or conservation   | 8            | 3     |
| A/504/4548      | Provide technical support in planning, conservation or building control  | 12           | 3     |
| J/504/4519      | Process applications to secure grant and other funding in planning or conservation   | 8            | 3     |
| A/504/4520      | Prepare applications grant and other funding in planning or conservation   | 9            | 4     |
| F/504/5421      | Process and consult on applications to reflect statutory and policy requirements in planning, conservation or building control | 14           | 3     |
| Y/504/4721      | Carry out measured survey in planning, conservation or building control  | 15           | 3     |
| A/504/4534      | Carry out an environmental survey in planning, conservation or building control  | 15           | 3     |
| J/504/4567      | Compile and present survey data in planning or building control  | 12           | 3     |



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|            |  |    |   |
|------------|--|----|---|
| J/504/4570 | Investigate and assess regulatory factors affecting potential developments in planning, conservation or building control | 12 | 3 |
| L/504/4571 | Prepare graphical information in Planning, conservation or building control  | 11 | 3 |
| F/504/4566 | Prepare applications and appeals to secure approvals and statutory consent in planning or conservation                   | 12 | 3 |
| M/504/4563 | Identify low carbon energy sources in planning, conservation or building control   | 14 | 3 |
| D/504/4560 | Prepare for and participate in meetings in planning, conservation or building control                                    | 10 | 3 |

## 2.9 Barred Units

Units with the same title at different levels or units with the same content cannot be combined in the same qualification.

## 2.10 Language

ABBE qualifications and assessment materials will be provided through the medium of English.

## 2.11 Grading

This qualification is: Pass/Fail

## 2.12 Pre-course Procedures

This qualification is available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that unfairly restrict access or progression thereby promoting equal opportunities.

There are no pre-entry requirements for this qualification.

## 2.13 Qualification Review Boards

Qualification Review Boards (QRBs) are set up for each qualification. The Boards are drawn from employers, centres, Higher Educational Institutes (HEIs) and others with a vested interest in the sector in which the qualification is used. The purpose of the QRB is to ensure that the content of the qualification and the proposed assessment methodology are fit for purpose and are appropriate to meet the requirements of the sector.

QRBs are ongoing and will be scheduled for specific points within the qualification lifetime; at the notional mid-point and again towards the review date of the qualification. During this process, the QRB will consider any feedback received on the performance of the qualification and will consider if the content, structure, purpose and assessment methodology remain appropriate to the needs of the sector. This will help to improve both our qualification and the specification.



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## 3. Qualification Unit(s)\*

### Pathway 1 - Spatial Planning

To achieve the ABBE Level 3 NVQ Diploma in Town Planning Technical Support (Spatial Planning) learners must achieve the five mandatory units and a minimum of two optional units.

#### Unit 1SP: Organise consultation and community engagement in planning or conservation

Unit Reference Number: Y/504/4718

Level: 3

Credit: 8

#### Unit Summary

This unit is about designing, carrying out, recording and presenting the results of engagement and consultation exercises with stakeholders and community groups in order to inform the development of policy and decision making. You will need to be familiar with best practice consultation and engagement techniques, have good organisational skills as well as effective recording and reporting abilities.

#### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to organise consultation and community engagement | 1.1 Identify and prioritise the outcomes to be achieved by the proposed consultation, ensuring that these are in line with organisational requirements   |
|  | 1.2 Identify the stakeholders and community groups who are likely to be involved in and affected by the proposed consultation  |
|  | 1.3 Plan and set up methods of consultation which will ensure that all relevant stakeholders and community groups are engaged  |
|  | 1.4 Present the consultation proposals to people and groups who are interested and informed, and summarise their feedback  |
|  | 1.5 Record and analyse the feedback against relevant criteria, identify the conflicting needs of different groups and users, the level of support and opposition, and describe how these needs might affect the consultation |



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|   |   |
|---|---|
|   | 1.6 Summarise the results of the consultations, and present the results to relevant decision-makers, stakeholders and community groups  |
| 2. Understand how to organise consultation and community engagement | 2.1 Describe how to identify and prioritise the outcomes to be achieved by the proposed consultation, ensuring that these are in line with organisational requirements  |
|   | 2.2 Describe how to identify the stakeholders and community groups who are likely to be involved in and affected by the proposed consultation   |
|   | 2.3 Propose how to plan and set up methods of consultation which will ensure that all relevant stakeholders and community groups are engaged  |
|   | 2.4 Explain how to present the consultation proposals to people and groups who are interested and informed, and summarise their feedback  |
|   | 2.5 Explain how to record and analyse the feedback against relevant criteria, identify the conflicting needs of different groups and users, the level of support and opposition, and describe how these needs might affect the consultation |
|   | 2.6 Explain how to summarise the results of the consultations, and present the results to relevant decision-makers, stakeholders and community groups   |



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## Unit 2SP: Work in a team in planning, conservation or building control

Unit Reference Number: R/504/4524

Level: 3

Credit: 10

### Unit Summary

This unit is about establishing good working relationships within a team, being mutually supportive of your colleagues and handling conflicts in a constructive manner. A team could be a collaboration of various parties from both within and external to your organisation. You will need to understand the dynamics of team working, have good interpersonal skills and be an effective communicator with customers.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to maintain relationships with people who are affected by your work        | 1. 1 Maintain working relationships and communicate clearly with people to promote goodwill, trust and understanding  |
|   | 1.2 Inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency   |
|   | 1.3 Offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments                       |
|   | 1.4 Present proposals for action clearly to people at an appropriate time and with the right level of detail for the circumstances, expenditure and risk involved |
|   | 1.5 Clarify with people objections to proposals and suggest alternative proposals   |
|   | 1.6 Deal with conflicts and differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding                            |
| 2. Understand how to maintain relationships with people who are affected by your work | 2.1 Explain how to maintain working relationships and communicate clearly with people to promote goodwill, trust and understanding                                |
|   | 2.2 Explain how to inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency                                |
|   | 2.3 Propose how to offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments        |
|   | 2.3 Propose how to offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments        |



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|                                     |  |
|-------------------------------------|--|
|                                     | 2.4 Explain how to present proposals for action clearly to people at an appropriate time and with the right level of detail for the circumstances, expenditure and risk involved |
|                                     | 2.5 Explain how to clarify with people objections to proposals and suggest alternative proposals   |
|                                     | 2.6 Explain how to deal with conflicts and differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding                            |
| 3. Be able to work in a team        | 3.1 Confirm the team work plan and responsibilities and methods by which activity will be monitored  |
|                                     | 3.2 Confirm the clear parameters which will enable the team to meet the requirements of the work plan  |
|                                     | 3.3 Co-operate with arrangements to achieve effective communication within the team and with stakeholders  |
|                                     | 3.4 Accept personal responsibilities needed and agree a realistic timescale and resources with the team  |
|                                     | 3.5 Report to team leader on timing, task completion and team processes  |
| 4. Understand how to work in a team | 4.1 Explain how to confirm the team work plan and responsibilities and methods by which activity will be monitored   |
|                                     | 4.2 Explain how to confirm the clear parameters which will enable the team to meet the requirements of the work plan   |
|                                     | 4.3 Explain how to co-operate with arrangements to achieve effective communication within the team and with stakeholders   |
|                                     | 4.4 Evaluate how to accept personal responsibilities needed and agree a realistic timescale and resources with the team  |
|                                     | 4.5 Explain how to report to team leader on timing, task completion and team processes   |



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## Unit 3SP: Carry out an environmental survey in planning, conservation or building control

Unit Reference Number: A/504/4534

Level: 3

Credit: 15

### Unit Summary

This unit is about the preparation, carrying out, recording analysing and presentations of all kinds of surveys. You will need to understand the purpose of the survey, so that the best methods and techniques are used to provide the information that is necessary to achieve the results that the organisation needs.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>            | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to prepare for an environmental survey        | 1.1 Confirm the purpose of the survey and significant factors affecting it  |
|  | 1.2 Check and confirm that a risk assessment is relevant and in place   |
|  | 1.3 Confirm any permission(s) that will be needed to carry out the survey and confirm that they are valid before the survey starts                                      |
|  | 1.4 Contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation                 |
|  | 1.5 Confirm methods and techniques for the survey which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public       |
|  | 1.6 Check and confirm that signs, arrangements for personal safety, equipment and site access conform to good practice, legislation and regulation                      |
| 2. Understand how to prepare for an environmental survey | 2.1 Explain how to confirm the purpose of the survey and significant factors affecting it   |
|  | 2.2 Explain how to check and confirm that a risk assessment is relevant and in place  |
|  | 2.3 Explain how to confirm any permission(s) that will be needed to carry out the survey and confirm that they are valid before the survey starts                       |
|  | 2.4 Explain how to contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their co-operation |



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|  |  |
|--|--|
|  | 2.5 Explain how to confirm methods and techniques for the survey which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public                   |
|  | 2.6 Explain how to check and confirm that signs, arrangements for personal safety, equipment and site access conform to good practice, legislation and regulation                                  |
| 3. Be able to conduct environmental surveys        | 3.1 Identify survey sources and collect and collate relevant data following safe working practices   |
|  | 3.2 Accurately analyse the data which has been collected about all of the significant factors related to the purpose of the survey   |
|  | 3.3 Consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems   |
|  | 3.4 Record accurate findings which are unambiguous, which clearly describe all the important factors in a format which is suitable for circulation and discussion with stakeholders                |
|  | 3.5 State clearly the authority for assumptions and projections  |
|  | 3.6 Assemble any supporting data which is relevant to the study, but which is not included in the report, store it safely and index it clearly for future reference                                |
| 4. Understand how to conduct environmental surveys | 4.1 Describe how to identify survey sources and collect and collate relevant data following safe working practices   |
|  | 4.2 Examine how to accurately analyse the data which has been collected about all of the significant factors related to the purpose of the survey  |
|  | 4.3 Explain how to consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems                                    |
|  | 4.4 Explain how to record accurate findings which are unambiguous, which clearly describe all the important factors in a format which is suitable for circulation and discussion with stakeholders |
|  | 4.5 Explain how to state clearly the authority for assumptions and projections   |
|  | 4.6 Explain how to assemble any supporting data which is relevant to the study, but which is not included in the report, store it safely and index it clearly for future reference                 |



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## Unit 4SP: Operate technical information systems in planning, conservation or building control

Unit Reference Number: K/504/4562

Level: 3

Credit: 10

### Unit Summary

This unit is about how you prepare, store and retrieve information. You will need to be able to plan the contents of each document and complete it to the required standard in a timely manner. You will need to be aware of confidentiality considerations. You will need to be able to collate, store and retrieve information in a variety of different ways and keep it up-to-date.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to operate information systems in planning, conservation and building control technical support        | 1.1 Obtain information and organise it into a suitable form for display and use   |
|   | 1.2 Store information using agreed organisational procedures  |
|   | 1.3 Advise and offer guidance to people who are unable to find the information they need and suggest alternative sources                    |
|   | 1.4 Operate the information system by following agreed procedures so that the information system remains reliable and secure                |
|   | 1.5 Record, update, archive and remove information following agreed procedures  |
|   | 1.6 Explain how to obtain information and organise it into a suitable form for display and use to others                                    |
| 2. Understand how to operate information systems in planning, conservation and building control technical support | 2.1 Explain how to obtain information and organise it into a suitable form for display and use  |
|   | 2.2 Explain how to store information using agreed organisational procedures   |
|   | 2.3 Explain how to advise and offer guidance to people who are unable to find the information they need and suggest alternative sources     |
|   | 2.4 Explain how to operate the information system by following agreed procedures so that the information system remains reliable and secure |



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|   |   |
|---|---|
|   | 2.5 Explain how to record, update, archive and remove information following agreed procedures   |
|   | 2.6 Describe how to identify and retrieve information which might be of use to others   |
| 3. Be able to prepare documents to meet specified requirements        | 3.1 Accurately establishing the purpose of the documents  |
|   | 3.2 Complete documents which meet specified requirements  |
|   | 3.3 Ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with organisational requirements                |
|   | 3.4 Ensure that the content of documents is comprehensive and accurate and is presented in a logical sequence                                       |
|   | 3.5 Ensure that recommendations, when required, are succinct and provide sufficient guidance to decision makers                                     |
|   | 3.6 Ensure that sources of information, upon which documents are based, are verified as accurate and valid  |
|   | 3.7 Ensure that work practices are in accordance with legal and regulatory requirements and organisational procedures                               |
|   | 3.8 Record promptly and accurately reasons where work is not achievable within specified deadlines  |
|   | 3.9 Provide completed documents within agreed deadlines   |
|   | 3.10 Maintain security and confidentiality of information   |
| 4. Understand how to prepare documents to meet specified requirements | 4.1 Explain how to accurately establishing the purpose of the documents   |
|   | 4.2 Explain how to complete documents which meet specified requirements   |
|   | 4.3 Explain how to ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with organisational requirements |
|   | 4.4 Explain how to ensure that the content of documents is comprehensive and accurate and is presented in a logical sequence                        |
|   | 4.5 Explain how to ensure that recommendations, when required, are succinct and provide sufficient guidance to decision makers                      |
|   | 4.6 Explain how to ensure that sources of information, upon which documents are based, are verified as accurate and valid                           |



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|--|--|
|  | 4.7 Explain how to ensure that work practices are in accordance with legal and regulatory requirements and organisational procedures |
|  | 4.8 Explain how to record promptly and accurately reasons where work is not achievable within specified deadlines                    |
|  | 4.9 Explain how to provide completed documents within agreed deadlines   |
|  | 4.10 Explain how to maintain security and confidentiality of information   |



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## Unit 5SP: Operate in a professional manner in planning, conservation or building control

Unit Reference Number: H/504/4561

Level: 3

Credit: 10

### Unit Summary

The unit is about the process of acting in an appropriate professional manner and taking responsibility for your personal development. You will need to carry out your work in line with accepted standards and good practice, taking personal responsibility for your actions, have a clear view of your personal development needs and systematically addressing those needs in a proactive manner.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to work in an ethical manner        | 1.1 Operate in accordance with legal requirements, ethical standards and recognised good practice  |
|  | 1.2 Make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected                 |
|  | 1.3 Take clear and unequivocal personal responsibility for own decisions   |
|  | 1.4 Disclose information only to those who have a statutory right to receive it  |
|  | 1.5 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust   |
| 2. Understand how to work in an ethical manner | 2.1 Explain how to operate in accordance with legal requirements, ethical standards and recognised good practice   |
|  | 2.2 Evaluate how to make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected |
|  | 2.3 Evaluate how to take clear and unequivocal personal responsibility for own decisions   |
|  | 2.4 Explain how to disclose information only to those who have a statutory right to receive it   |
|  | 2.5 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust  |



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|---|---|
| 3. Be able to undertake personal development        | 3.1 Define the personal aims and objectives for undertaking personal development  |
|   | 3.2 Identify and agree sources of support and guidance for undertaking personal development   |
|   | 3.3 Analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs                |
|   | 3.4 Agree a development plan for achieving identified development needs   |
|   | 3.5 Undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                                   |
|   | 3.6 Record evidence of competence gained against the identified standards of competence and review progress against aims and objectives   |
| 4. Understand how to undertake personal development | 4.1 Evaluate how to define the personal aims and objectives for undertaking personal development  |
|   | 4.2 Describe how to identify and agree sources of support and guidance for undertaking personal development   |
|   | 4.3 Examine how to analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs |
|   | 4.4 Evaluate how to agree a development plan for achieving identified development needs   |
|   | 4.5 Evaluate how to undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                   |
|   | 4.6 Explain how to record evidence of competence gained against the identified standards of competence and review progress against aims and objectives  |



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## Unit 6SP: Provide technical support in planning, conservation or building control

Unit Reference Number: A/504/4548

Level: 3

Credit: 12

### Unit Summary

This unit is about providing technical advice to the public either upon reception, by phone or through written communication and the checking and initial processing of applications. You will need to have a good understanding of the range of application types, what they should comprise and be able to advise the public on a range of technical issues associated with your field.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to respond to requests for information about proposals, processes and requirements        | 1.1 Identify the main areas of legislation, regulations, procedures and values applicable to the area of work  |
|  | 1.2 Ensure that reliable and up-to-date sources of relevant information are readily available for reference and guidance   |
|  | 1.3 Interpret accurately the nature of proposals, processes and requirements from available information  |
|  | 1.4 Notify the people involved and seek competent advice where there is uncertainty about the correct interpretation of proposals, processes and requirements                |
|  | 1.5 Respond promptly to requests for information related to proposals, processes and requirements  |
|  | 1.6 Collect all relevant available required information about proposals, processes and requirements  |
|  | 1.7 Carry out the relevant research where the necessary information is not immediately available   |
|  | 1.8 Provide the requested information accurately and appropriately to the needs of the enquirers involved and the situation  |
| 2. Understand how to respond to requests for information about proposals, processes and requirements | 2.1 Describe how to identify the main areas of legislation, regulations, procedures and values applicable to the area of work  |
|  | 2.2 Explain how to ensure that reliable and up-to-date sources of relevant information are readily available for reference and guidance                                      |
|  | 2.3 Examine how to interpret accurately the nature of proposals, processes and requirements from available information   |
|  | 2.4 Explain how to notify the people involved and seek competent advice where there is uncertainty about the correct interpretation of proposals, processes and Requirements |



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|   | 2.5 Explain how to respond promptly to requests for information related to proposals, processes and requirements                           |
|   | 2.6 Explain how to collect all relevant available required information about proposals, processes and requirements                         |
|   | 2.7 Examine how to carry out the relevant research where the necessary information is not immediately available                            |
|   | 2.8 Explain how to provide the requested information accurately and appropriately to the needs of the enquirers involved and the situation |
| 3. Be able to administer statutory processes        | 3.1 Check application documentation for completeness   |
|   | 3.2 Take agreed procedural action in response to missing application documentation or insufficiency of information                         |
|   | 3.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements              |
|   | 3.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements              |
|   | 3.4 Categorise applications based on all available information   |
|   | 3.5 Add information to files and systems in line with agreed procedures  |
|   | 3.6 Pass applications to the next stage of the process   |
| 4. Understand how to administer statutory processes | 4.1 Explain how to check application documentation for Completeness  |
|   | 4.2 Explain how to take agreed procedural action in response to missing application documentation or insufficiency of information          |
|   | 4.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements              |
|   | 4.4 Explain how to categorise applications based on all available information  |
|   | 4.5 Explain how to add information to files and systems in line with agreed procedures   |
|   | 4.6 Explain how to pass applications to the next stage of the process  |



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## Unit 7SP: Process applications to secure grant and other funding in planning or conservation

Unit Reference Number: J/504/4519

Level: 3

Credit: 8

### Unit Summary

This unit is about the receiving, validating and processing of applications for grants and other sources of funding from your organisation. You will need to be aware of the procedures involved in processing applications, what the criteria are for decision making and how to prepare the application for the decision maker.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                        | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to process applications to secure grant and other funding | 1.1 Acknowledge applications for grants promptly and check them against statutory and policy requirements   |
|  | 1.2 Identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof   |
|  | 1.3 Check applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria for approval by decision makers                                     |
|  | 1.4 Refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants  |
|  | 1.4 Refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers, and prepare a justified rejection to send to unsuccessful applicants |
|  | 1.5 Issue and record decisions clearly, draft the conditions in an agreed format and pass it on to the applicant  |
|  | 1.6 Check that applicants are complying with the conditions applying to grants, identify those who are not and advise them on what they need to do to comply with the conditions  |
|  | 1.7 Complete the administration of the decision making process within the time allowed to meet statutory and policy requirements  |
| 2. Understand how to process applications                            | 2.1 Explain how to acknowledge applications for grants promptly and check them against statutory and policy requirements  |



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|                                   |   |
|-----------------------------------|---|
| to secure grant and other funding | 2.2 Describe how to identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof   |
|                                   | 2.3 Explain how to check applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria for approval by decision makers                                    |
|                                   | 2.4 Explain how to refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants |
|                                   | 2.4 Explain how to refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants |
|                                   | 2.5 Explain how to issue and record decisions clearly, draft the conditions in an agreed format and pass it on to the applicant   |
|                                   | 2.6 Explain how to check that applicants are complying with the conditions applying to grants, identify those who are not and advise them on what they need to do to comply with the conditions   |
|                                   | 2.7 Explain how to complete the administration of the decision making process within the time allowed to meet statutory and policy requirements   |



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## Unit 8SP: Prepare applications grant and other funding in planning or conservation

Unit Reference Number: A/504/4520

Level: 4

Credit: 9

### Unit Summary

This unit is about the process of making applications to government, the European Union, the National Lottery and other organisations for grants to enable your organisation to fund projects. You will need to understand the range of grants available, the criteria and timescales involved and their suitability for your organisation's purposes.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>               | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to prepare applications to secure funding        | 1.1 Calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints                     |
|   | 1.2 Identify which aspects of a project satisfy the eligibility criteria for incentive schemes  |
|   | 1.3 Check and confirm with the approving body the requirements, current procedures and likely timescale   |
|   | 1.4 Forecast how long the submission and approval of an application for incentives will take and how this will fit in with the project schedule |
|   | 1.5 Identify the implications of delays, failure to apply for and achieve approval and circulating the information to the stakeholders          |
|   | 1.6 Prepare and assemble the information that will be needed for the application  |
|   | 1.7 Prepare and submit a clear and valid application for the incentives   |
|   | 1.8 Provide the approving bodies with additional clear, relevant and accurate information when it is requested                                  |
|   | 1.9 Negotiate with approving bodies to secure incentives  |
| 2. Understand how to prepare applications to secure funding | 2.1 Explain how to calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints      |
|   | 2.2 Describe how to identify which aspects of a project satisfy the eligibility criteria for incentive schemes                                  |



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|  | 2.3 Explain how to check and confirm with the approving body the requirements, current procedures and likely timescale   |
|  | 2.4 Examine how to forecast how long the submission and approval of an application for incentives will take and how this will fit in with the project schedule |
|  | 2.5 Describe how to identify the implications of delays, failure to apply for and achieve approval and circulating the information to the stakeholders         |
|  | 2.6 Explain how to prepare and assemble the information that will be needed for the application  |
|  | 2.7 Describe how to prepare and submit a clear and valid application for the incentives  |
|  | 2.8 Describe how to provide the approving bodies with additional clear, relevant and accurate information when it is requested                                 |
|  | 2.9 Propose how to negotiate with approving bodies to secure incentives  |



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## Unit 9SP: Process and consult on applications to reflect statutory and policy requirements in planning, conservation or building control

Unit Reference Number: F/504/4521

Level: 3

Credit: 14

### Unit Summary

This unit is about the receipt, checking, validation and process of applications, including, where relevant, the carrying out of the consultation, publicity and notification. You will need to have a good understanding of the range of application types, what they should comprise, who will need to be consulted and the procedures involved in their processing.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to process and consult on applications to reflect statutory and policy requirements        | 1.1 Process applications promptly and check them against statutory and policy requirements   |
|   | 1.2 Identify inconsistent and incomplete information in applications and ask applicants for more information                           |
|   | 1.3 Check applications in detail against the relevant technical policy and evaluation criteria   |
|   | 1.4 Identify appropriate consultees and other interested parties on their application in relation to statutory and policy requirements |
|   | 1.5 Initiate consultation with interested parties and monitor process  |
|   | 1.6 Collect information and refer checked applications to decision makers within the time allowed and to meet legal requirements       |
|   | 1.7 Collate responses to the consultation and refer them to decision makers within the time allowed and to meet legal requirements     |
|   | 1.8 Prepare, check, issue and record decisions and inform applicants and other parties in an appropriate form                          |
| 2. Understand how to process and consult on applications to reflect statutory and policy requirements | 2.1 Explain how to process applications promptly and check them against statutory and policy requirements                              |
|   | 2.2 Describe how to identify inconsistent and incomplete information in applications and ask applicants for more information           |
|   | 2.3 Explain how to check applications in detail against the relevant technical policy and evaluation criteria                          |



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|  | 2.4 Describe how to identify appropriate consultees and other interested parties on their application in relation to statutory and policy requirements |
|  | 2.5 Propose how to initiate consultation with interested parties and monitor process   |
|  | 2.6 Explain how to collect information and refer checked applications to decision makers within the time allowed and to meet legal requirements        |
|  | 2.7 Explain how to collate responses to the consultation and refer them to decision makers within the time allowed and to meet legal requirements      |
|  | 2.8 Explain how to prepare, check, issue and record decisions and inform applicants and other parties in an appropriate form                           |



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## Unit 10SP: Identify and monitor compliance of developments in planning, conservation or building control

Unit Reference Number: D/504/4719

Level: 3

Credit: 14

### Unit Summary

This unit is about the investigation, analysis and progression of complaints about potential breaches of regulatory control. You will need to be able to understand the range of application types and how they would apply to existing developments so that potential breaches of control can be correctly identified and appropriate action taken.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>               | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to monitor compliance of authorised works        | 1.1 Identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty   |
|   | 1.2 Advise on legal and statutory responsibilities to those responsible for implementing them before they start the development  |
|   | 1.3 Follow an agreed control system, collect information and record it accurately  |
|   | 1.4 Identify situations which do not comply with legal and statutory requirements, investigate and report the circumstances thoroughly to enable the appropriate corrective action to be taken                 |
|   | 1.5 Identify any new legal and statutory requirements which may have an impact on the development, summarise the important details and pass these on to people who have an interest                            |
| 2. Understand how to monitor compliance of authorised works | 2.1 Describe how to identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty   |
|   | 2.2 Propose how to advise on legal and statutory responsibilities to those responsible for implementing them before they start the development   |
|   | 2.3 Explain how to follow an agreed control system, collect information and record it accurately   |
|   | 2.4 Describe how to identify situations which do not comply with legal and statutory requirements, investigate and report the circumstances thoroughly to enable the appropriate corrective action to be taken |
|   | 2.5 Describe how to identify any new legal and statutory requirements which may have an impact on the development,   |



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|   | summarise the important details and pass these on to people who have an interest  |
| 3. Be able to identify and monitor unauthorised developments        | 3.1 Identify and check unauthorised development against statutory and policy regulations and record them accurately   |
|   | 3.2 Record and summarise information about breaches in compliance and circulate the information to the people responsible for maintaining compliance                                  |
|   | 3.3 Notify the people responsible for the breach of the possible consequences and steps needed to restore compliance  |
|   | 3.4 Issue standard warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit                |
|   | 3.5 Recommend follow up action in cases of breach of compliance   |
|   | 3.6 Prepare and submit clear and accurate evidence of breaches to decision makers   |
| 4. Understand how to identify and monitor unauthorised developments | 4.1 Describe how to identify and check unauthorised development against statutory and policy regulations and record them accurately   |
|   | 4.2 Explain how to record and summarise information about breaches in compliance and circulate the information to the people responsible for maintaining compliance                   |
|   | 4.3 Explain how to notify the people responsible for the breach of the possible consequences and steps needed to restore compliance   |
|   | 4.4 Explain how to issue standard warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit |
|   | 4.5 Propose how to recommend follow up action in cases of breach of compliance  |
|   | 4.6 Explain how to prepare and submit clear and accurate evidence of breaches to decision makers  |



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## Unit 11SP: Carry out measured survey in planning, conservation or building control

Unit Reference Number: Y/504/4721

Level: 3

Credit: 15

### Unit Summary

This unit is concerned with conducting a measured survey on land or buildings. You will need to be able to collect, check and verify survey data. You will need to check your results, and present them in a way that helps the user.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>      | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to prepare for survey operations        | 1.1 Identify what survey information is needed, how accurate the information needs to be and what information outputs are required from the survey                 |
|  | 1.2 Analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed                         |
|  | 1.3 Confirm with the people who will be affected that the survey method statement is accurate before starting the work   |
|  | 1.4 Check and confirm that a risk assessment is relevant and in place  |
|  | 1.5 Arrange for suitable equipment, and enough spares for maintenance, to be available and kept safely and securely  |
|  | 1.6 Check and confirm, before starting work, that people who will be affected have given their permission  |
|  | 1.7 Brief the people who will be involved in the survey about the survey arrangements and the safety arrangements  |
|  | 1.8 Contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation            |
|  | 1.9 Check and confirm that signs, arrangements for safety, equipment and site access conform to good practice, legislation and regulation                          |
| 2. Understand how to prepare for survey operations | 2.1 Describe how to identify what survey information is needed, how accurate the information needs to be and what information outputs are required from the survey |
|  | 2.2 Examine how to analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed          |
|  | 2.3 Explain how to confirm with the people who will be affected that the survey method statement is accurate before starting the work                              |



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|   | 2.4 Explain how to check and confirm that a risk assessment is relevant and in place   |
|   | 2.5 Explain how to arrange for suitable equipment, and enough spares for maintenance, to be available and kept safely and securely                                     |
|   | 2.6 Explain how to check and confirm, before starting work, that people who will be affected have given their permission   |
|   | 2.7 Explain how to brief the people who will be involved in the survey about the survey arrangements and the safety arrangements                                       |
|   | 2.8 Explain how to contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation |
|   | 2.9 Explain how to check and confirm that signs, arrangements for safety, equipment and site access conform to good practice, legislation and regulation               |
| 3. Be able to conduct measured surveys        | 3.1 Conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum                            |
|   | 3.2 Conform to safe working practices  |
|   | 3.3 Consult with experts when specialist information is needed which is relevant to the survey   |
|   | 3.4 Take accurate observations and measurements using valid methods  |
|   | 3.5 Change work procedures and practices to allow for different circumstances and conditions   |
|   | 3.6 Record survey data clearly and accurately and store it securely for later analysis   |
|   | 3.7 Keep a clear and accurate record of the time spent on the survey and of any problems that come up which may affect cost or accuracy                                |
|   | 3.8 Maintain the equipment in operating condition and store it securely  |
| 4. Understand how to conduct measured surveys | 4.1 Explain how to conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum             |
|   | 4.2 Explain how to conform to safe working practices   |
|   | 4.3 Explain how to consult with experts when specialist information is needed which is relevant to the survey  |
|   | 4.4 Explain how to take accurate observations and measurements using valid methods   |
|   | 4.5 Explain how to change work procedures and practices to allow for different circumstances and conditions  |
|   | 4.6 Explain how to record survey data clearly and accurately and store it securely for later analysis  |



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|  | 4.7 Explain how to keep a clear and accurate record of the time spent on the survey and of any problems that come up which may affect cost or accuracy |
|  | 4.8 Explain how to maintain the equipment in operating condition and store it securely   |



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## Unit 12SP: Compile and present survey data in planning or building control

Unit Reference Number: J/504/4567

Level: 3

Credit: 12

### Unit Summary

This unit is concerned with presenting the results of a survey of any kind of land or buildings. You will need to be able to collect, check and verify survey data. You will need to check your results, and present them in a way that helps the user.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b> | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to compile survey data             | 1.1 Confirm that the survey data is appropriate for the intended purpose   |
|   | 1.2 Check data selected from all the specified sources and reject invalid data   |
|   | 1.3 Conform to data security and quality assurance requirements  |
|   | 1.4 Confirm terms for permission to use data, including copyright  |
|   | 1.5 Confirm the requirements for compilation material and maintain complete and accurate compilation records and histories throughout the project                |
|   | 1.6 Extract, compile and compute data accurately and in a suitable form for analysing and presentation   |
| 2. Understand how to compile survey data      | 2.1 Explain how to confirm that the survey data is appropriate for the intended purpose  |
|   | 2.2 Explain how to check data selected from all the specified sources and reject invalid data  |
|   | 2.3 Explain how to conform to data security and quality assurance requirements   |
|   | 2.4 Explain how to confirm terms for permission to use data, including copyright   |
|   | 2.5 Explain how to confirm the requirements for compilation material and maintain complete and accurate compilation records and histories throughout the project |
|   | 2.6 Explain how to extract, compile and compute data accurately and in a suitable form for analysing and presentation  |



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| 3. Be able to analyse and present survey results        | 3.1 Collect together enough survey data to allow an accurate analysis to be made  |
|   | 3.2 Verify the survey data and adjust the data to maintain accuracy and integrity   |
|   | 3.3 Analyse the survey data accurately  |
|   | 3.4 Present the results of the survey information, the commentary and any support information accurately, clearly and in a format which is suitable for those who need to use it                |
| 4. Understand how to analyse and present survey results | 4.1 Explain how to collect together enough survey data to allow an accurate analysis to be made   |
|   | 4.2 Examine how to verify the survey data and adjust the data to maintain accuracy and integrity  |
|   | 4.3 Examine how to analyse the survey data accurately   |
|   | 4.4 Explain how to present the results of the survey information, the commentary and any support information accurately, clearly and in a format which is suitable for those who need to use it |



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## Unit 13SP: Investigate and assess regulatory factors affecting potential developments in planning, conservation or building control

Unit Reference Number: J/504/4570

Level: 3

Credit: 12

### Unit Summary

This unit is about demonstrating your ability to investigate the requirements of the planning and other regulatory authorities, reporting the valid options and obtaining the required statutory consents for developments. You will need to investigate the requirements of the planning and regulatory authorities which apply to the development. You will also be required to produce a report which identifies the options available and the legal implications and which includes providing supporting data and giving advice on the implications of the report.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                         | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to identify regulatory requirements and constraints        | 1.1 Identify the requirements of planning and other regulatory bodies which have an interest in key factors of the development                 |
|   | 1.2 Identify and assess the relative importance of existing and anticipated regulations  |
|   | 1.3 Identify and review opportunities and constraints which could result from both existing and anticipated regulations                        |
|   | 1.4 Summarise any regulatory constraints which might affect the viability of the development   |
| 2. Understand how to identify regulatory requirements and constraints | 2.1 Describe how to identify the requirements of planning and other regulatory bodies which have an interest in key factors of the development |
|   | 2.2 Describe how to identify and assess the relative importance of existing and anticipated regulations  |
|   | 2.3 Describe how to identify and review opportunities and constraints which could result from both existing and anticipated regulations        |
|   | 2.4 Explain how to summarise any regulatory constraints which might affect the viability of the development                                    |
| 3. Be able to report and advise on                                    | 3.1 Identify and assess existing solutions which are similar to the regulatory constraints which may apply to the development                  |



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| Potential developments   | 3.2 Investigate and test the requirements and preferences of planning and other regulatory bodies which have an interest in key development factors and report valid options and objections to the stakeholders                |
|  | 3.3 Match findings which have legal implications to relevant legislation and related guidance  |
|  | 3.4 Produce an accurate and unambiguous report based on the investigation findings which clearly identifies the options available  |
|  | 3.6 Provide clear and accurate advice on the findings and implications of the investigation, to stakeholders   |
| 4. Understand how to report and advise on potential developments | 4.1 Describe how to identify and assess existing solutions which are similar to the regulatory constraints which may apply to the development  |
|  | 4.2 Examine how to investigate and test the requirements and preferences of planning and other regulatory bodies which have an interest in key development factors and report valid options and objections to the stakeholders |
|  | 4.3 Propose how to match findings which have legal implications to relevant legislation and related guidance   |
|  | 4.4 Explain how to produce an accurate and unambiguous report based on the investigation findings which clearly identifies the options available   |
|  | 4.5 Explain how to assemble any supporting data which is relevant to the investigation, but which is not included in the report, store it safely and index it clearly for future reference                                     |
|  | 4.6 Propose how to provide clear and accurate advice on the findings and implications of the investigation, to stakeholders  |



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## Unit 14SP: Prepare graphical information in planning, conservation or building control

Unit Reference Number: L/504/4571

Level: 3

Credit: 11

### Unit Summary

This unit requires you to be able to complete drawings and graphics that are accurate and fit for purpose. In a planning context this unit concerns the production of drawings and graphics to illustrate or present a particular planning scheme (including development proposals, plans, strategies and planning options) and a particular conservation or building regulation scheme.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>      | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to produce graphical information        | 1.1 Agree with the project team and the decision makers the purpose of the presentation and the presentation materials which will be used                  |
|  | 1.2 Select methods and media which are suitable for the graphics required, and which can be produced with the resources and time available                 |
|  | 1.3 Use standard drawing conventions and identify and justify any deviations from them   |
|  | 1.4 Produce graphics which are complete, accurate, and comply with the design information and which are suitable for the purpose                           |
|  | 1.5 Clarify any information to be included which is incomplete and inconsistent and make accurate amendments   |
|  | 1.6 Keep registers and records of graphics which are complete, accurate and up-to-date   |
|  | 1.7 Obtain necessary checks and approvals for the content and presentation of graphics   |
|  | 1.8 Use methods for production and record keeping which are consistent with quality assurance procedures   |
| 2. Understand how to produce graphical information | 2.1 Evaluate how to agree with the project team and the decision makers the purpose of the presentation and the presentation materials which will be used  |
|  | 2.2 Evaluate how to select methods and media which are suitable for the graphics required, and which can be produced with the resources and time available |
|  | 2.3 Explain how to use standard drawing conventions and identify and justify any deviations from them  |



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|  | 2.4 Explain how to produce graphics which are complete, accurate, and comply with the design information and which are suitable for the purpose |
|  | 2.5 Explain how to clarify any information to be included which is incomplete and inconsistent and make accurate amendments                     |
|  | 2.6 Explain how to keep registers and records of graphics which are complete, accurate and up- to-date  |
|  | 2.7 Explain how to obtain necessary checks and approvals for the content and presentation of graphics   |
|  | 2.8 Explain how to use methods for production and record keeping which are consistent with quality assurance procedures                         |



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## Unit 15SP: Process information relevant to breaches of regulation in planning, conservation or building control

Unit Reference Number: R/504/4572

Level: 3

Credit: 10

### Unit Summary

The unit is about the investigation, analysis and progression of complaints about potential breaches of regulatory control. You will need to be able to understand the range of application types and how they would apply to existing developments so that potential breaches of control can be correctly identified and the appropriate action taken. You will also be responsible for preparing briefing material for decision makers and drafting formal responses.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>              | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to gather information relevant to a case        | 1.1 Identify and collate information which is relevant to the potential breach of regulation, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it                 |
|  | 1.2 Obtain information about similar cases, identifying key points and common features and produce an accurate summary   |
|  | 1.3 Identify and evaluate the information which will support the case and summarise and justify it in a reasoned argument  |
|  | 1.4 Consult with interested parties, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required   |
|  | 1.5 Disclose information which is relevant to the case only to those who have a right to see it  |
|  | 1.6 Pass the case to the relevant decision makers within agreed timescales   |
| 2. Understand how to gather information relevant to a case | 2.1 Describe how to identify and collate information which is relevant to the potential breach of regulation, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it |
|  | 2.2 Explain how to obtain information about similar cases, identifying key points and common features and produce an accurate summary  |
|  | 2.3 Describe how to identify and evaluate the information which will support the case and summarise and justify it in a reasoned argument  |



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|  | 2.4 Explain how to consult with interested parties, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required |
|  | 2.5 Explain how to disclose information which is relevant to the case only to those who have a right to see it  |
|  | 2.6 Explain how to pass the case to the relevant decision makers within agreed timescales   |
| 3. Be able to progress the resolution of the case        | 3.1 Prepare documents about the potential breach of regulations which have a clear rationale, and which include valid supporting information                                  |
|  | 3.2 Keep regular contact with the people involved in order to progress the case   |
|  | 3.3 Summarise and record points of agreement and disagreement and refer them to decision makers   |
|  | 3.4 Draft agreed formal responses accurately and in a suitable style  |
| 4. Understand how to progress the resolution of the case | 4.1 Explain how to prepare documents about the potential breach of regulations which have a clear rationale, and which include valid supporting information                   |
|  | 4.2 Explain how to keep regular contact with the people involved in order to progress the case  |
|  | 4.3 Explain how to summarise and record points of agreement and disagreement and refer them to decision makers  |
|  | 4.4 Explain how to draft agreed formal responses accurately and in a suitable style   |



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## Unit 16SP: Prepare applications and appeals to secure approvals and statutory consent in planning or conservation

Unit Reference Number: F/504/4566

Level: 3

Credit: 12

### Unit Summary

This unit is concerned with preparing applications to secure approvals and consents. You will need to check and confirm with approving bodies the requirements, procedures and likely timescales for the approval of incentives. You will also need to prepare and submit the applications.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to prepare and submit applications to secure approvals and consents        | 1.1 Identify which aspects of the project are subject to statutory controls and will need consents  |
|   | 1.2 Check and confirm with the relevant authorities the requirements, current procedures and likely timescale for statutory approvals and other consents                |
|   | 1.3 Forecast how long the submission and approval of applications for consent will take and how this will fit in with the project schedule                              |
|   | 1.4 Identify the implications of delays, failure to apply for and achieve consent and circulate the information to the stakeholders                                     |
|   | 1.5 Prepare and assemble the information that will be needed for the application  |
|   | 1.6 Prepare and submit a clear and valid application for the consent  |
|   | 1.7 Provide the consent authorities with additional clear, relevant and accurate information when it is requested   |
|   | 1.8 Manage negotiations with consent authorities to secure consents   |
|   | 1.9 Plan and agree alternatives with the client in anticipation of approval being refused   |
| 1. Understand how to prepare and submit applications to secure approvals and consents | 2.1 Describe how to identify which aspects of the project are subject to statutory controls and will need consents  |
|   | 2.2 Explain how to check and confirm with the relevant authorities the requirements, current procedures and likely timescale for statutory approvals and other consents |



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|  | 2.3 Examine how to forecast how long the submission and approval of applications for consent will take and how this will fit in with the project schedule |
|  | 2.4 Describe how to identify the implications of delays, failure to apply for and achieve consent and circulate the information to the stakeholders       |
|  | 2.5 Explain how to prepare and assemble the information that will be needed for the application   |
|  | 2.6 Explain how to prepare and submit a clear and valid application for the consent   |
|  | 2.7 Explain how to provide the consent authorities with additional clear, relevant and accurate information when it is requested                          |
|  | 2.8 Evaluate how to manage negotiations with consent authorities to secure consents   |
|  | 2.9 Propose how to plan and agree alternatives with the client in anticipation of approval being refused  |



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## Unit 17SP: Identify low carbon energy sources in planning, conservation or building control

Unit Reference Number: M/504/4563

Level: 3

Credit: 14

### Unit Summary

This unit is about reviewing the benefits of using low carbon energy sources on a project within the context of current legislative and policy frameworks. This may involve using standardised toolkits. You will need to present and discuss your recommendations with stakeholders.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>           | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to identify low carbon energy sources        | 1.1 Identify the range of low carbon energy sources required in the context of current legislative and policy frameworks                 |
|   | 1.2 Gather information about the scope for using low carbon energy sources   |
|   | 1.3 Review and identify the range of low carbon energy sources and the implications for the project                                      |
|   | 1.4 Identify which low carbon energy sources are likely to provide the best outcome for the project                                      |
|   | 1.5 Present and discuss recommendations with stakeholders  |
| 2. Understand how to identify low carbon energy sources | 2.1 Describe how to identify the range of low carbon energy sources required in the context of current legislative and policy frameworks |
|   | 2.2 Explain how to gather information about the scope for using low carbon energy sources  |
|   | 2.3 Examine how to review and identify the range of low carbon energy sources and the implications for the project                       |
|   | 2.4 Describe how to identify which low carbon energy sources are likely to provide the best outcome for the project                      |
|   | 2.5 Explain how to present and discuss recommendations with Stakeholders   |



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## Unit 18SP: Prepare for and participate in meetings in planning, conservation or building control

Unit Reference Number: D/504/4560

Level: 3

Credit: 10

### Unit Summary

This unit is about organising and participating in meetings. You will need to ensure that the venue and facilities are organised. You will also need to prepare and circulate the agenda and papers. You will also need to produce and circulate a record of the meeting. You need to prepare for meetings, participate effectively in them and ensure that any follow up actions are taken.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to work in an ethical manner        | 1.1 Operate in accordance with legal requirements, ethical standards and recognised good practice  |
|  | 1.2 Make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected                 |
|  | 1.3 Take clear and unequivocal personal responsibility for own decisions   |
|  | 1.4 Disclose information only to those who have a statutory right to receive it  |
|  | 1.5 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust   |
| 2. Understand how to work in an ethical manner | 2.1 Explain how to operate in accordance with legal requirements, ethical standards and recognised good practice   |
|  | 2.2 Evaluate how to make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected |
|  | 2.3 Evaluate how to take clear and unequivocal personal responsibility for own decisions   |
|  | 2.4 Explain how to disclose information only to those who have a statutory right to receive it   |
|  | 2.5 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust  |
| 3. Be able to undertake personal               | 3.1 Define the personal aims and objectives for undertaking personal development   |



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| development   | 3.2 Identify and agree sources of support and guidance for undertaking personal development   |
|   | 3.3 Analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs                |
|   | 3.4 Agree a development plan for achieving identified development needs   |
|   | 3.5 Undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                                   |
|   | 3.6 Record evidence of competence gained against the identified standards of competence and review progress against aims and objectives   |
|   | 4. Understand how to undertake personal development   |
| 4. Understand how to undertake personal development | 4.1 Evaluate how to define the personal aims and objectives for undertaking personal development  |
|   | 4.2 Describe how to identify and agree sources of support and guidance for undertaking personal development   |
|   | 4.3 Examine how to analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs |
|   | 4.4 Evaluate how to agree a development plan for achieving identified development needs   |
|   | 4.5 Evaluate how to undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                   |
|   | 4.6 Explain how to record evidence of competence gained against the identified standards of competence and review progress against aims and objectives  |



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## Pathway 2 - Development Management

To achieve the ABBE Level 3 NVQ Diploma in Town Planning Technical Support (Development Management) learners must achieve the five mandatory units and a minimum of two optional units

### Unit 1DM: Provide technical support in planning, conservation or building control

Unit Reference Number: A/504/4548

Level: 3

Credit: 12

#### Unit Summary

This unit is about providing technical advice to the public either upon reception, by phone or through written communication and the checking and initial processing of applications. You will need to have a good understanding of the range of application types, what they should comprise and be able to advise the public on a range of technical issues associated with your field.

#### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to respond to requests for information about proposals, processes and requirements | 1.1 Identify the main areas of legislation, regulations, procedures and values applicable to the area of work   |
|   | 1.2 Ensure that reliable and up-to-date sources of relevant information are readily available for reference and guidance                                      |
|   | 1.3 Interpret accurately the nature of proposals, processes and requirements from available information   |
|   | 1.4 Notify the people involved and seek competent advice where there is uncertainty about the correct interpretation of proposals, processes and requirements |
|   | 1.5 Respond promptly to requests for information related to proposals, processes and requirements   |
|   | 1.6 Collect all relevant available required information about proposals, processes and requirements   |
|   | 1.7 Carry out the relevant research where the necessary information is not immediately available  |
|   | 1.8 Provide the requested information accurately and appropriately to the needs of the enquirers involved and the situation                                   |
| 2. Understand how to respond to requests  | 2.1 Describe how to identify the main areas of legislation, regulations, procedures and values applicable to the area of work                                 |
|   | 2.2 Explain how to ensure that reliable and up-to-date sources of relevant information are readily available for reference and guidance                       |



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| for information about proposals, processes and requirements           | 2.3 Examine how to interpret accurately the nature of proposals, processes and requirements from available information   |
|   | 2.4 Explain how to notify the people involved and seek competent advice where there is uncertainty about the correct interpretation of proposals, processes and Requirements |
|   | 2.5 Explain how to respond promptly to requests for information related to proposals, processes and requirements   |
|   | 2.6 Explain how to collect all relevant available required information about proposals, processes and requirements   |
|   | 2.7 Examine how to carry out the relevant research where the necessary information is not immediately available  |
|   | 2.8 Explain how to provide the requested information accurately and appropriately to the needs of the enquirers involved and the situation                                   |
| 3. Be able to administer statutory processes                          | 3.1 Check application documentation for completeness   |
|   | 3.2 Take agreed procedural action in response to missing application documentation or insufficiency of information   |
|   | 3.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements  |
|   | 3.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements  |
|   | 3.4 Categorise applications based on all available information   |
|   | 3.5 Add information to files and systems in line with agreed procedures  |
| 4. Understand how to administer statutory processes                   | 3.6 Pass applications to the next stage of the process   |
|   | 4.1 Explain how to check application documentation for Completeness  |
|   | 4.2 Explain how to take agreed procedural action in response to missing application documentation or insufficiency of information  |
|   | 4.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements  |
|   | 4.4 Explain how to categorise applications based on all available information  |
|   | 4.5 Explain how to add information to files and systems in line with agreed procedures   |
| 4.6 Explain how to pass applications to the next stage of the process |  |



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## Unit 2DM: Process and consult on applications to reflect statutory and policy requirements in planning, conservation or building control

Unit Reference Number: F/504/4521

Level: 3

Credit: 14

### Unit Summary

This unit is about the receipt, checking, validation and process of applications, including, where relevant, the carrying out of the consultation, publicity and notification. You will need to have a good understanding of the range of application types, what they should comprise, who will need to be consulted and the procedures involved in their processing.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to process and consult on applications to reflect statutory and policy requirements        | 1.1 Process applications promptly and check them against statutory and policy requirements   |
|   | 1.2 Identify inconsistent and incomplete information in applications and ask applicants for more information                           |
|   | 1.3 Check applications in detail against the relevant technical policy and evaluation criteria   |
|   | 1.4 Identify appropriate consultees and other interested parties on their application in relation to statutory and policy requirements |
|   | 1.5 Initiate consultation with interested parties and monitor process  |
|   | 1.6 Collect information and refer checked applications to decision makers within the time allowed and to meet legal requirements       |
|   | 1.7 Collate responses to the consultation and refer them to decision makers within the time allowed and to meet legal requirements     |
|   | 1.8 Prepare, check, issue and record decisions and inform applicants and other parties in an appropriate form                          |
| 2. Understand how to process and consult on applications to reflect statutory and policy requirements | 2.1 Explain how to process applications promptly and check them against statutory and policy requirements                              |
|   | 2.2 Describe how to identify inconsistent and incomplete information in applications and ask applicants for more information           |
|   | 2.3 Explain how to check applications in detail against the relevant technical policy and evaluation criteria                          |



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|  | 2.4 Describe how to identify appropriate consultees and other interested parties on their application in relation to statutory and policy requirements |
|  | 2.5 Propose how to initiate consultation with interested parties and monitor process   |
|  | 2.6 Explain how to collect information and refer checked applications to decision makers within the time allowed and to meet legal requirements        |
|  | 2.7 Explain how to collate responses to the consultation and refer them to decision makers within the time allowed and to meet legal requirements      |
|  | 2.8 Explain how to prepare, check, issue and record decisions and inform applicants and other parties in an appropriate form                           |



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## Unit 3DM: Work in a team in planning, conservation or building control

Unit Reference Number: R/504/4524

Level: 3

Credit: 10

### Unit Summary

This unit is about establishing good working relationships within a team, being mutually supportive of your colleagues and handling conflicts in a constructive manner. A team could be a collaboration of various parties from both within and external to your organisation. You will need to understand the dynamics of team working, have good interpersonal skills and be an effective communicator with customers.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to maintain relationships with people who are affected by your work        | 1. 1 Maintain working relationships and communicate clearly with people to promote goodwill, trust and understanding  |
|   | 1.2 Inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency   |
|   | 1.3 Offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments                       |
|   | 1.4 Present proposals for action clearly to people at an appropriate time and with the right level of detail for the circumstances, expenditure and risk involved |
|   | 1.5 Clarify with people objections to proposals and suggest alternative proposals   |
|   | 1.6 Deal with conflicts and differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding                            |
| 2. Understand how to maintain relationships with people who are affected by your work | 2.1 Explain how to maintain working relationships and communicate clearly with people to promote goodwill, trust and understanding                                |
|   | 2.2 Explain how to inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency                                |
|   | 2.3 Propose how to offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments        |
|   | 2.3 Propose how to offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments        |



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|                                     | 2.4 Explain how to present proposals for action clearly to people at an appropriate time and with the right level of detail for the circumstances, expenditure and risk involved |
|                                     | 2.5 Explain how to clarify with people objections to proposals and suggest alternative proposals   |
|                                     | 2.6 Explain how to deal with conflicts and differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding                            |
| 3. Be able to work in a team        | 3.1 Confirm the team work plan and responsibilities and methods by which activity will be monitored  |
|                                     | 3.2 Confirm the clear parameters which will enable the team to meet the requirements of the work plan  |
|                                     | 3.3 Co-operate with arrangements to achieve effective communication within the team and with stakeholders  |
|                                     | 3.4 Accept personal responsibilities needed and agree a realistic timescale and resources with the team  |
|                                     | 3.5 Report to team leader on timing, task completion and team processes  |
| 4. Understand how to work in a team | 4.1 Explain how to confirm the team work plan and responsibilities and methods by which activity will be monitored   |
|                                     | 4.2 Explain how to confirm the clear parameters which will enable the team to meet the requirements of the work plan   |
|                                     | 4.3 Explain how to co-operate with arrangements to achieve effective communication within the team and with stakeholders   |
|                                     | 4.4 Evaluate how to accept personal responsibilities needed and agree a realistic timescale and resources with the team  |
|                                     | 4.5 Explain how to report to team leader on timing, task completion and team processes   |



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## Unit 4DM: Operate technical information systems in planning, conservation or building control

Unit Reference Number: K/504/4562

Level: 3

Credit: 10

### Unit Summary

This unit is about how you prepare, store and retrieve information. You will need to be able to plan the contents of each document and complete it to the required standard in a timely manner. You will need to be aware of confidentiality considerations. You will need to be able to collate, store and retrieve information in a variety of different ways and keep it up-to-date.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to operate information systems in planning, conservation and building control technical support        | 1.1 Obtain information and organise it into a suitable form for display and use   |
|   | 1.2 Store information using agreed organisational procedures  |
|   | 1.3 Advise and offer guidance to people who are unable to find the information they need and suggest alternative sources                    |
|   | 1.4 Operate the information system by following agreed procedures so that the information system remains reliable and secure                |
|   | 1.5 Record, update, archive and remove information following agreed procedures  |
|   | 1.6 Explain how to obtain information and organise it into a suitable form for display and use to others                                    |
| 2. Understand how to operate information systems in planning, conservation and building control technical support | 2.1 Explain how to obtain information and organise it into a suitable form for display and use  |
|   | 2.2 Explain how to store information using agreed organisational procedures   |
|   | 2.3 Explain how to advise and offer guidance to people who are unable to find the information they need and suggest alternative sources     |
|   | 2.4 Explain how to operate the information system by following agreed procedures so that the information system remains reliable and secure |



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|   | 2.5 Explain how to record, update, archive and remove information following agreed procedures   |
|   | 2.6 Describe how to identify and retrieve information which might be of use to others   |
| 3. Be able to prepare documents to meet specified requirements        | 3.1 Accurately establishing the purpose of the documents  |
|   | 3.2 Complete documents which meet specified requirements  |
|   | 3.3 Ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with organisational requirements                |
|   | 3.4 Ensure that the content of documents is comprehensive and accurate and is presented in a logical sequence                                       |
|   | 3.5 Ensure that recommendations, when required, are succinct and provide sufficient guidance to decision makers                                     |
|   | 3.6 Ensure that sources of information, upon which documents are based, are verified as accurate and valid  |
|   | 3.7 Ensure that work practices are in accordance with legal and regulatory requirements and organisational procedures                               |
|   | 3.8 Record promptly and accurately reasons where work is not achievable within specified deadlines  |
|   | 3.9 Provide completed documents within agreed deadlines   |
|   | 3.10 Maintain security and confidentiality of information   |
| 4. Understand how to prepare documents to meet specified requirements | 4.1 Explain how to accurately establishing the purpose of the documents   |
|   | 4.2 Explain how to complete documents which meet specified requirements   |
|   | 4.3 Explain how to ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with organisational requirements |
|   | 4.4 Explain how to ensure that the content of documents is comprehensive and accurate and is presented in a logical sequence                        |
|   | 4.5 Explain how to ensure that recommendations, when required, are succinct and provide sufficient guidance to decision makers                      |
|   | 4.6 Explain how to ensure that sources of information, upon which documents are based, are verified as accurate and valid                           |



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|  | 4.7 Explain how to ensure that work practices are in accordance with legal and regulatory requirements and organisational procedures |
|  | 4.8 Explain how to record promptly and accurately reasons where work is not achievable within specified deadlines                    |
|  | 4.9 Explain how to provide completed documents within agreed deadlines   |
|  | 4.10 Explain how to maintain security and confidentiality of information   |



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## Unit 5DM: Operate in a professional manner in planning, conservation or building control

Unit Reference Number: H/504/4561

Level: 3

Credit: 10

### Unit Summary

The unit is about the process of acting in an appropriate professional manner and taking responsibility for your personal development. You will need to carry out your work in line with accepted standards and good practice, taking personal responsibility for your actions, have a clear view of your personal development needs and systematically addressing those needs in a proactive manner.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to work in an ethical manner        | 1.1 Operate in accordance with legal requirements, ethical standards and recognised good practice  |
|  | 1.2 Make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected                 |
|  | 1.3 Take clear and unequivocal personal responsibility for own decisions   |
|  | 1.4 Disclose information only to those who have a statutory right to receive it  |
|  | 1.5 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust   |
| 2. Understand how to work in an ethical manner | 2.1 Explain how to operate in accordance with legal requirements, ethical standards and recognised good practice   |
|  | 2.2 Evaluate how to make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected |
|  | 2.3 Evaluate how to take clear and unequivocal personal responsibility for own decisions   |
|  | 2.4 Explain how to disclose information only to those who have a statutory right to receive it   |
|  | 2.5 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust  |



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| 3. Be able to undertake personal development        | 3.1 Define the personal aims and objectives for undertaking personal development  |
|   | 3.2 Identify and agree sources of support and guidance for undertaking personal development   |
|   | 3.3 Analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs                |
|   | 3.4 Agree a development plan for achieving identified development needs   |
|   | 3.5 Undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                                   |
|   | 3.6 Record evidence of competence gained against the identified standards of competence and review progress against aims and objectives   |
| 4. Understand how to undertake personal development | 4.1 Evaluate how to define the personal aims and objectives for undertaking personal development  |
|   | 4.2 Describe how to identify and agree sources of support and guidance for undertaking personal development   |
|   | 4.3 Examine how to analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs |
|   | 4.4 Evaluate how to agree a development plan for achieving identified development needs   |
|   | 4.5 Evaluate how to undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                   |
|   | 4.6 Explain how to record evidence of competence gained against the identified standards of competence and review progress against aims and objectives  |



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## Unit 6DM: Organise consultation and community engagement in planning or conservation

Unit Reference Number: Y/504/4718

Level: 3

Credit: 8

### Unit Summary

This unit is about designing, carrying out, recording and presenting the results of engagement and consultation exercises with stakeholders and community groups in order to inform the development of policy and decision making. You will need to be familiar with best practice consultation and engagement techniques, have good organisational skills as well as effective recording and reporting abilities.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                       | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to organise consultation and community engagement        | 1.1 Identify and prioritise the outcomes to be achieved by the proposed consultation, ensuring that these are in line with organisational requirements   |
|   | 1.2 Identify the stakeholders and community groups who are likely to be involved in and affected by the proposed consultation  |
|   | 1.3 Plan and set up methods of consultation which will ensure that all relevant stakeholders and community groups are engaged  |
|   | 1.4 Present the consultation proposals to people and groups who are interested and informed, and summarise their feedback  |
|   | 1.5 Record and analyse the feedback against relevant criteria, identify the conflicting needs of different groups and users, the level of support and opposition, and describe how these needs might affect the consultation |
|   | 1.6 Summarise the results of the consultations, and present the results to relevant decision-makers, stakeholders and community groups   |
| 2. Understand how to organise consultation and community engagement | 2.1 Describe how to identify and prioritise the outcomes to be achieved by the proposed consultation, ensuring that these are in line with organisational requirements   |
|   | 2.2 Describe how to identify the stakeholders and community groups who are likely to be involved in and affected by the proposed consultation  |



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|  | 2.3 Propose how to plan and set up methods of consultation which will ensure that all relevant stakeholders and community groups are engaged  |
|  | 2.4 Explain how to present the consultation proposals to people and groups who are interested and informed, and summarise their feedback  |
|  | 2.5 Explain how to record and analyse the feedback against relevant criteria, identify the conflicting needs of different groups and users, the level of support and opposition, and describe how these needs might affect the consultation |
|  | 2.6 Explain how to summarise the results of the consultations, and present the results to relevant decision-makers, stakeholders and community groups   |



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## Unit 7DM: Process applications to secure grant and other funding in planning or conservation

Unit Reference Number: J/504/4519

Level: 3

Credit: 8

### Unit Summary

This unit is about the receiving, validating and processing of applications for grants and other sources of funding from your organisation. You will need to be aware of the procedures involved in processing applications, what the criteria are for decision making and how to prepare the application for the decision maker.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                        | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to process applications to secure grant and other funding | 1.1 Acknowledge applications for grants promptly and check them against statutory and policy requirements   |
|  | 1.2 Identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof   |
|  | 1.3 Check applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria for approval by decision makers                                     |
|  | 1.4 Refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants  |
|  | 1.4 Refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers, and prepare a justified rejection to send to unsuccessful applicants |
|  | 1.5 Issue and record decisions clearly, draft the conditions in an agreed format and pass it on to the applicant  |
|  | 1.6 Check that applicants are complying with the conditions applying to grants, identify those who are not and advise them on what they need to do to comply with the conditions  |
|  | 1.7 Complete the administration of the decision making process within the time allowed to meet statutory and policy requirements  |
| 2. Understand how to process applications                            | 2.1 Explain how to acknowledge applications for grants promptly and check them against statutory and policy requirements  |



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| to secure grant and other funding | 2.2 Describe how to identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof   |
|                                   | 2.3 Explain how to check applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria for approval by decision makers                                    |
|                                   | 2.4 Explain how to refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants |
|                                   | 2.4 Explain how to refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants |
|                                   | 2.5 Explain how to issue and record decisions clearly, draft the conditions in an agreed format and pass it on to the applicant   |
|                                   | 2.6 Explain how to check that applicants are complying with the conditions applying to grants, identify those who are not and advise them on what they need to do to comply with the conditions   |
|                                   | 2.7 Explain how to complete the administration of the decision making process within the time allowed to meet statutory and policy requirements   |



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## Unit 8DM: Prepare applications grant and other funding in planning or conservation

Unit Reference Number: A/504/4520

Level: 4

Credit: 9

### Unit Summary

This unit is about the process of making applications to government, the European Union, the National Lottery and other organisations for grants to enable your organisation to fund projects. You will need to understand the range of grants available, the criteria and timescales involved and their suitability for your organisation's purposes.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>               | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to prepare applications to secure funding        | 1.1 Calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints                     |
|   | 1.2 Identify which aspects of a project satisfy the eligibility criteria for incentive schemes  |
|   | 1.3 Check and confirm with the approving body the requirements, current procedures and likely timescale   |
|   | 1.4 Forecast how long the submission and approval of an application for incentives will take and how this will fit in with the project schedule |
|   | 1.5 Identify the implications of delays, failure to apply for and achieve approval and circulating the information to stakeholders              |
|   | 1.6 Prepare and assemble the information that will be needed for the application  |
|   | 1.7 Prepare and submit a clear and valid application for the incentives   |
|   | 1.8 Provide the approving bodies with additional clear, relevant and accurate information when it is requested                                  |
|   | 1.9 Negotiate with approving bodies to secure incentives  |
| 2. Understand how to prepare applications to secure funding | 2.1 Explain how to calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints      |
|   | 2.2 Describe how to identify which aspects of a project satisfy the eligibility criteria for incentive schemes                                  |



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|  | 2.3 Explain how to check and confirm with the approving body the requirements, current procedures and likely timescale   |
|  | 2.4 Examine how to forecast how long the submission and approval of an application for incentives will take and how this will fit in with the project schedule |
|  | 2.5 Describe how to identify the implications of delays, failure to apply for and achieve approval and circulating the information to the stakeholders         |
|  | 2.6 Explain how to prepare and assemble the information that will be needed for the application  |
|  | 2.7 Describe how to prepare and submit a clear and valid application for the incentives  |
|  | 2.8 Describe how to provide the approving bodies with additional clear, relevant and accurate information when it is requested                                 |
|  | 2.9 Propose how to negotiate with approving bodies to secure incentives  |



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## Unit 9DM: Identify and monitor compliance of developments in planning, conservation or building control

Unit Reference Number: D/504/4719

Level: 3

Credit: 14

### Unit Summary

This unit is about the investigation, analysis and progression of complaints about potential breaches of regulatory control. You will need to be able to understand the range of application types and how they would apply to existing developments so that potential breaches of control can be correctly identified and appropriate action taken.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>               | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to monitor compliance of authorised works        | 1.1 Identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty   |
|   | 1.2 Advise on legal and statutory responsibilities to those responsible for implementing them before they start the development  |
|   | 1.3 Follow an agreed control system, collect information and record it accurately  |
|   | 1.4 Identify situations which do not comply with legal and statutory requirements, investigate and report the circumstances thoroughly to enable the appropriate corrective action to be taken                 |
|   | 1.5 Identify any new legal and statutory requirements which may have an impact on the development, summarise the important details and pass these on to people who have an interest                            |
| 2. Understand how to monitor compliance of authorised works | 2.1 Describe how to identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty   |
|   | 2.2 Propose how to advise on legal and statutory responsibilities to those responsible for implementing them before they start the development   |
|   | 2.3 Explain how to follow an agreed control system, collect information and record it accurately   |
|   | 2.4 Describe how to identify situations which do not comply with legal and statutory requirements, investigate and report the circumstances thoroughly to enable the appropriate corrective action to be taken |
|   | 2.5 Describe how to identify any new legal and statutory requirements which may have an impact on the development,   |



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|   | summarise the important details and pass these on to people who have an interest  |
| 3. Be able to identify and monitor unauthorised developments        | 3.1 Identify and check unauthorised development against statutory and policy regulations and record them accurately   |
|   | 3.2 Record and summarise information about breaches in compliance and circulate the information to the people responsible for maintaining compliance                                  |
|   | 3.3 Notify the people responsible for the breach of the possible consequences and steps needed to restore compliance  |
|   | 3.4 Issue standard warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit                |
|   | 3.5 Recommend follow up action in cases of breach of compliance   |
|   | 3.6 Prepare and submit clear and accurate evidence of breaches to decision makers   |
| 4. Understand how to identify and monitor unauthorised developments | 4.1 Describe how to identify and check unauthorised development against statutory and policy regulations and record them accurately   |
|   | 4.2 Explain how to record and summarise information about breaches in compliance and circulate the information to the people responsible for maintaining compliance                   |
|   | 4.3 Explain how to notify the people responsible for the breach of the possible consequences and steps needed to restore compliance   |
|   | 4.4 Explain how to issue standard warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit |
|   | 4.5 Propose how to recommend follow up action in cases of breach of compliance  |
|   | 4.6 Explain how to prepare and submit clear and accurate evidence of breaches to decision makers  |



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## Unit 10DM: Carry out measured survey in planning, conservation or building control

Unit Reference Number: Y/504/4721

Level: 3

Credit: 15

### Unit Summary

This unit is concerned with conducting a measured survey on land or buildings. You will need to be able to collect, check and verify survey data. You will need to check your results, and present them in a way that helps the user.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>      | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to prepare for survey operations        | 1.1 Identify what survey information is needed, how accurate the information needs to be and what information outputs are required from the survey                 |
|  | 1.2 Analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed                         |
|  | 1.3 Confirm with the people who will be affected that the survey method statement is accurate before starting the work   |
|  | 1.4 Check and confirm that a risk assessment is relevant and in place  |
|  | 1.5 Arrange for suitable equipment, and enough spares for maintenance, to be available and kept safely and securely  |
|  | 1.6 Check and confirm, before starting work, that people who will be affected have given their permission  |
|  | 1.7 Brief the people who will be involved in the survey about the survey arrangements and the safety arrangements  |
|  | 1.8 Contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation            |
|  | 1.9 Check and confirm that signs, arrangements for safety, equipment and site access conform to good practice, legislation and regulation                          |
| 2. Understand how to prepare for survey operations | 2.1 Describe how to identify what survey information is needed, how accurate the information needs to be and what information outputs are required from the survey |
|  | 2.2 Examine how to analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed          |



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|   | 2.3 Explain how to confirm with the people who will be affected that the survey method statement is accurate before starting the work                                  |
|   | 2.4 Explain how to check and confirm that a risk assessment is relevant and in place   |
|   | 2.5 Explain how to arrange for suitable equipment, and enough spares for maintenance, to be available and kept safely and securely                                     |
|   | 2.6 Explain how to check and confirm, before starting work, that people who will be affected have given their permission   |
|   | 2.7 Explain how to brief the people who will be involved in the survey about the survey arrangements and the safety arrangements                                       |
|   | 2.8 Explain how to contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation |
|   | 2.9 Explain how to check and confirm that signs, arrangements for safety, equipment and site access conform to good practice, legislation and regulation               |
| 3. Be able to conduct measured surveys        | 3.1 Conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum                            |
|   | 3.2 Conform to safe working practices  |
|   | 3.3 Consult with experts when specialist information is needed which is relevant to the survey   |
|   | 3.4 Take accurate observations and measurements using valid methods  |
|   | 3.5 Change work procedures and practices to allow for different circumstances and conditions   |
|   | 3.6 Record survey data clearly and accurately and store it securely for later analysis   |
|   | 3.7 Keep a clear and accurate record of the time spent on the survey and of any problems that come up which may affect cost or accuracy                                |
|   | 3.8 Maintain the equipment in operating condition and store it securely  |
| 4. Understand how to conduct measured surveys | 4.1 Explain how to conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum             |
|   | 4.2 Explain how to conform to safe working practices   |
|   | 4.3 Explain how to consult with experts when specialist information is needed which is relevant to the survey  |
|   | 4.4 Explain how to take accurate observations and measurements using valid methods   |
|   | 4.5 Explain how to change work procedures and practices to allow for different circumstances and conditions  |
|   | 4.6 Explain how to record survey data clearly and accurately and store it securely for later analysis  |



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|  | 4.7 Explain how to keep a clear and accurate record of the time spent on the survey and of any problems that come up which may affect cost or accuracy |
|  | 4.8 Explain how to maintain the equipment in operating condition and store it securely   |



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## Unit 11DM: Carry out an environmental survey in planning, conservation or building control

Unit Reference Number: A/504/4534

Level: 3

Credit: 15

### Unit Summary

This unit is about the preparation, carrying out, recording analysing and presentations of all kinds of surveys. You will need to understand the purpose of the survey, so that the best methods and techniques are used to provide the information that is necessary to achieve the results that the organisation needs.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>            | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to prepare for an environmental survey        | 1.1 Confirm the purpose of the survey and significant factors affecting it  |
|  | 1.2 Check and confirm that a risk assessment is relevant and in place   |
|  | 1.3 Confirm any permission(s) that will be needed to carry out the survey and confirm that they are valid before the survey starts                                      |
|  | 1.4 Contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation                 |
|  | 1.5 Confirm methods and techniques for the survey which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public       |
|  | 1.6 Check and confirm that signs, arrangements for personal safety, equipment and site access conform to good practice, legislation and regulation                      |
| 2. Understand how to prepare for an environmental survey | 2.1 Explain how to confirm the purpose of the survey and significant factors affecting it   |
|  | 2.2 Explain how to check and confirm that a risk assessment is relevant and in place  |
|  | 2.3 Explain how to confirm any permission(s) that will be needed to carry out the survey and confirm that they are valid before the survey starts                       |
|  | 2.4 Explain how to contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their co-operation |



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|  | 2.5 Explain how to confirm methods and techniques for the survey which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public                   |
|  | 2.6 Explain how to check and confirm that signs, arrangements for personal safety, equipment and site access conform to good practice, legislation and regulation                                  |
| 3. Be able to conduct environmental surveys        | 3.1 Identify survey sources and collect and collate relevant data following safe working practices   |
|  | 3.2 Accurately analyse the data which has been collected about all of the significant factors related to the purpose of the survey   |
|  | 3.3 Consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems   |
|  | 3.4 Record accurate findings which are unambiguous, which clearly describe all the important factors in a format which is suitable for circulation and discussion with stakeholders                |
|  | 3.5 State clearly the authority for assumptions and projections  |
|  | 3.6 Assemble any supporting data which is relevant to the study, but which is not included in the report, store it safely and index it clearly for future reference                                |
| 4. Understand how to conduct environmental surveys | 4.1 Describe how to identify survey sources and collect and collate relevant data following safe working practices   |
|  | 4.2 Examine how to accurately analyse the data which has been collected about all of the significant factors related to the purpose of the survey  |
|  | 4.3 Explain how to consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems                                    |
|  | 4.4 Explain how to record accurate findings which are unambiguous, which clearly describe all the important factors in a format which is suitable for circulation and discussion with stakeholders |
|  | 4.5 Explain how to state clearly the authority for assumptions and projections   |
|  | 4.6 Explain how to assemble any supporting data which is relevant to the study, but which is not included in the report, store it safely and index it clearly for future reference                 |



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## Unit 12DM: Compile and present survey data in planning or building control

Unit Reference Number: J/504/4567

Level: 3

Credit: 12

### Unit Summary

This unit is concerned with presenting the results of a survey of any kind of land or buildings. You will need to be able to collect, check and verify survey data. You will need to check your results, and present them in a way that helps the user.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b> | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to compile survey data             | 1.1 Confirm that the survey data is appropriate for the intended purpose   |
|   | 1.2 Check data selected from all the specified sources and reject invalid data   |
|   | 1.3 Conform to data security and quality assurance requirements  |
|   | 1.4 Confirm terms for permission to use data, including copyright  |
|   | 1.5 Confirm the requirements for compilation material and maintain complete and accurate compilation records and histories throughout the project                |
|   | 1.6 Extract, compile and compute data accurately and in a suitable form for analysing and presentation   |
| 2. Understand how to compile survey data      | 2.1 Explain how to confirm that the survey data is appropriate for the intended purpose  |
|   | 2.2 Explain how to check data selected from all the specified sources and reject invalid data  |
|   | 2.3 Explain how to conform to data security and quality assurance requirements   |
|   | 2.4 Explain how to confirm terms for permission to use data, including copyright   |
|   | 2.5 Explain how to confirm the requirements for compilation material and maintain complete and accurate compilation records and histories throughout the project |
|   | 2.6 Explain how to extract, compile and compute data accurately and in a suitable form for analysing and presentation  |



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| 3. Be able to analyse and present survey results        | 3.1 Collect together enough survey data to allow an accurate analysis to be made  |
|   | 3.2 Verify the survey data and adjust the data to maintain accuracy and integrity   |
|   | 3.3 Analyse the survey data accurately  |
|   | 3.4 Present the results of the survey information, the commentary and any support information accurately, clearly and in a format which is suitable for those who need to use it                |
| 4. Understand how to analyse and present survey results | 4.1 Explain how to collect together enough survey data to allow an accurate analysis to be made   |
|   | 4.2 Examine how to verify the survey data and adjust the data to maintain accuracy and integrity  |
|   | 4.3 Examine how to analyse the survey data accurately   |
|   | 4.4 Explain how to present the results of the survey information, the commentary and any support information accurately, clearly and in a format which is suitable for those who need to use it |



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## Unit 13DM: Investigate and assess regulatory factors affecting potential developments in planning, conservation or building control

Unit Reference Number: J/504/4570

Level: 3

Credit: 12

### Unit Summary

This unit is about demonstrating your ability to investigate the requirements of the planning and other regulatory authorities, reporting the valid options and obtaining the required statutory consents for developments. You will need to investigate the requirements of the planning and regulatory authorities which apply to the development. You will also be required to produce a report which identifies the options available and the legal implications and which includes providing supporting data and giving advice on the implications of the report.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                         | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to identify regulatory requirements and constraints        | 1.1 Identify the requirements of planning and other regulatory bodies which have an interest in key factors of the development                 |
|   | 1.2 Identify and assess the relative importance of existing and anticipated regulations  |
|   | 1.3 Identify and review opportunities and constraints which could result from both existing and anticipated regulations                        |
|   | 1.4 Summarise any regulatory constraints which might affect the viability of the development   |
| 2. Understand how to identify regulatory requirements and constraints | 2.1 Describe how to identify the requirements of planning and other regulatory bodies which have an interest in key factors of the development |
|   | 2.2 Describe how to identify and assess the relative importance of existing and anticipated regulations  |
|   | 2.3 Describe how to identify and review opportunities and constraints which could result from both existing and anticipated regulations        |
|   | 2.4 Explain how to summarise any regulatory constraints which might affect the viability of the development                                    |



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| 3. Be able to report and advise on potential developments        | 3.1 Identify and assess existing solutions which are similar to the regulatory constraints which may apply to the development  |
|  | 3.2 Investigate and test the requirements and preferences of planning and other regulatory bodies which have an interest in key development factors and report valid options and objections to the stakeholders                |
|  | 3.3 Match findings which have legal implications to relevant legislation and related guidance  |
|  | 3.4 Produce an accurate and unambiguous report based on the investigation findings which clearly identifies the options available  |
|  | 3.6 Provide clear and accurate advice on the findings and implications of the investigation, to stakeholders   |
| 4. Understand how to report and advise on potential developments | 4.1 Describe how to identify and assess existing solutions which are similar to the regulatory constraints which may apply to the development  |
|  | 4.2 Examine how to investigate and test the requirements and preferences of planning and other regulatory bodies which have an interest in key development factors and report valid options and objections to the stakeholders |
|  | 4.3 Propose how to match findings which have legal implications to relevant legislation and related guidance   |
|  | 4.4 Explain how to produce an accurate and unambiguous report based on the investigation findings which clearly identifies the options available   |
|  | 4.5 Explain how to assemble any supporting data which is relevant to the investigation, but which is not included in the report, store it safely and index it clearly for future reference                                     |
|  | 4.6 Propose how to provide clear and accurate advice on the findings and implications of the investigation, to stakeholders  |



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## Unit 14DM: Prepare graphical information in planning, conservation or building control

Unit Reference Number: L/504/4571

Level: 3

Credit: 11

### Unit Summary

This unit requires you to be able to complete drawings and graphics that are accurate and fit for purpose. In a planning context this unit concerns the production of drawings and graphics to illustrate or present a particular planning scheme (including development proposals, plans, strategies and planning options) and a particular conservation or building regulation scheme.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>      | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to produce graphical information        | 1.1 Agree with the project team and the decision makers the purpose of the presentation and the presentation materials which will be used                  |
|  | 1.2 Select methods and media which are suitable for the graphics required, and which can be produced with the resources and time available                 |
|  | 1.3 Use standard drawing conventions and identify and justify any deviations from them   |
|  | 1.4 Produce graphics which are complete, accurate, and comply with the design information and which are suitable for the purpose                           |
|  | 1.5 Clarify any information to be included which is incomplete and inconsistent and make accurate amendments   |
|  | 1.6 Keep registers and records of graphics which are complete, accurate and up-to-date   |
|  | 1.7 Obtain necessary checks and approvals for the content and presentation of graphics   |
|  | 1.8 Use methods for production and record keeping which are consistent with quality assurance procedures   |
| 2. Understand how to produce graphical information | 2.1 Evaluate how to agree with the project team and the decision makers the purpose of the presentation and the presentation materials which will be used  |
|  | 2.2 Evaluate how to select methods and media which are suitable for the graphics required, and which can be produced with the resources and time available |
|  | 2.3 Explain how to use standard drawing conventions and identify and justify any deviations from them  |



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|  | 2.4 Explain how to produce graphics which are complete, accurate, and comply with the design information and which are suitable for the purpose |
|  | 2.5 Explain how to clarify any information to be included which is incomplete and inconsistent and make accurate amendments                     |
|  | 2.6 Explain how to keep registers and records of graphics which are complete, accurate and up- to-date  |
|  | 2.7 Explain how to obtain necessary checks and approvals for the content and presentation of graphics   |
|  | 2.8 Explain how to use methods for production and record keeping which are consistent with quality assurance procedures                         |



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## Unit 15DM: Process information relevant to breaches of regulation in planning, conservation or building control

Unit Reference Number: R/504/4572

Level: 3

Credit: 10

### Unit Summary

The unit is about the investigation, analysis and progression of complaints about potential breaches of regulatory control. You will need to be able to understand the range of application types and how they would apply to existing developments so that potential breaches of control can be correctly identified and the appropriate action taken. You will also be responsible for preparing briefing material for decision makers and drafting formal responses.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>              | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to gather information relevant to a case        | 1.1 Identify and collate information which is relevant to the potential breach of regulation, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it                 |
|  | 1.2 Obtain information about similar cases, identifying key points and common features and produce an accurate summary   |
|  | 1.3 Identify and evaluate the information which will support the case and summarise and justify it in a reasoned argument  |
|  | 1.4 Consult with interested parties, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required   |
|  | 1.5 Disclose information which is relevant to the case only to those who have a right to see it  |
|  | 1.6 Pass the case to the relevant decision makers within agreed timescales   |
| 2. Understand how to gather information relevant to a case | 2.1 Describe how to identify and collate information which is relevant to the potential breach of regulation, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it |
|  | 2.2 Explain how to obtain information about similar cases, identifying key points and common features and produce an accurate summary  |
|  | 2.3 Describe how to identify and evaluate the information which will support the case and summarise and justify it in a reasoned argument  |



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|  | 2.4 Explain how to consult with interested parties, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required |
|  | 2.5 Explain how to disclose information which is relevant to the case only to those who have a right to see it  |
|  | 2.6 Explain how to pass the case to the relevant decision makers within agreed timescales   |
| 3. Be able to progress the resolution of the case        | 3.1 Prepare documents about the potential breach of regulations which have a clear rationale, and which include valid supporting information                                  |
|  | 3.2 Keep regular contact with the people involved in order to progress the case   |
|  | 3.3 Summarise and record points of agreement and disagreement and refer them to decision makers   |
|  | 3.4 Draft agreed formal responses accurately and in a suitable style  |
| 4. Understand how to progress the resolution of the case | 4.1 Explain how to prepare documents about the potential breach of regulations which have a clear rationale, and which include valid supporting information                   |
|  | 4.2 Explain how to keep regular contact with the people involved in order to progress the case  |
|  | 4.3 Explain how to summarise and record points of agreement and disagreement and refer them to decision makers  |
|  | 4.4 Explain how to draft agreed formal responses accurately and in a suitable style   |



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## Unit 16DM: Prepare applications and appeals to secure approvals and statutory consent in planning or conservation

Unit Reference Number: F/504/4566

Level: 3

Credit: 12

### Unit Summary

This unit is concerned with preparing applications to secure approvals and consents. You will need to check and confirm with approving bodies the requirements, procedures and likely timescales for the approval of incentives. You will also need to prepare and submit the applications.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to prepare and submit applications to secure approvals and consents        | 1.1 Identify which aspects of the project are subject to statutory controls and will need consents   |
|   | 1.2 Check and confirm with the relevant authorities the requirements, current procedures and likely timescale for statutory approvals and other consents |
|   | 1.3 Forecast how long the submission and approval of applications for consent will take and how this will fit in with the project schedule               |
|   | 1.4 Identify the implications of delays, failure to apply for and achieve consent and circulate the information to the stakeholders                      |
|   | 1.5 Prepare and assemble the information that will be needed for the application   |
|   | 1.6 Prepare and submit a clear and valid application for the consent   |
|   | 1.7 Provide the consent authorities with additional clear, relevant and accurate information when it is requested  |
|   | 1.8 Manage negotiations with consent authorities to secure consents  |
|   | 1.9 Plan and agree alternatives with the client in anticipation of approval being refused  |
| 2. Understand how to prepare and submit applications to secure approvals and consents | 2.1 Describe how to identify which aspects of the project are subject to statutory controls and will need consents                                       |



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|  | 2.2 Explain how to check and confirm with the relevant authorities the requirements, current procedures and likely timescale for statutory approvals and other consents |
|  | 2.3 Examine how to forecast how long the submission and approval of applications for consent will take and how this will fit in with the project schedule               |
|  | 2.4 Describe how to identify the implications of delays, failure to apply for and achieve consent and circulate the information to the stakeholders                     |
|  | 2.5 Explain how to prepare and assemble the information that will be needed for the application   |
|  | 2.6 Explain how to prepare and submit a clear and valid application for the consent   |
|  | 2.7 Explain how to provide the consent authorities with additional clear, relevant and accurate information when it is requested  |
|  | 2.8 Evaluate how to manage negotiations with consent authorities to secure consents   |
|  | 2.9 Propose how to plan and agree alternatives with the client in anticipation of approval being refused  |



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## Unit 17DM: Identify low carbon energy sources in planning, conservation or building control

Unit Reference Number: M/504/4563

Level: 3

Credit: 14

### Unit Summary

This unit is about reviewing the benefits of using low carbon energy sources on a project within the context of current legislative and policy frameworks. This may involve using standardised toolkits. You will need to present and discuss your recommendations with stakeholders.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>           | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to identify low carbon energy sources        | 1.1 Identify the range of low carbon energy sources required in the context of current legislative and policy frameworks                 |
|   | 1.2 Gather information about the scope for using low carbon energy sources   |
|   | 1.3 Review and identify the range of low carbon energy sources and the implications for the project                                      |
|   | 1.4 Identify which low carbon energy sources are likely to provide the best outcome for the project                                      |
|   | 1.5 Present and discuss recommendations with stakeholders  |
| 2. Understand how to identify low carbon energy sources | 2.1 Describe how to identify the range of low carbon energy sources required in the context of current legislative and policy frameworks |
|   | 2.2 Explain how to gather information about the scope for using low carbon energy sources  |
|   | 2.3 Examine how to review and identify the range of low carbon energy sources and the implications for the project                       |
|   | 2.4 Describe how to identify which low carbon energy sources are likely to provide the best outcome for the project                      |
|   | 2.5 Explain how to present and discuss recommendations with Stakeholders   |



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## Unit 18DM: Prepare for and participate in meetings in planning, conservation or building control

Unit Reference Number: D/504/4560

Level: 3

Credit: 10

### Unit Summary

This unit is about organising and participating in meetings. You will need to ensure that the venue and facilities are organised. You will also need to prepare and circulate the agenda and papers. You will also need to produce and circulate a record of the meeting. You need to prepare for meetings, participate effectively in them and ensure that any follow up actions are taken.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to work in an ethical manner        | 1.1 Operate in accordance with legal requirements, ethical standards and recognised good practice  |
|  | 1.2 Make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected                 |
|  | 1.3 Take clear and unequivocal personal responsibility for own decisions   |
|  | 1.4 Disclose information only to those who have a statutory right to receive it  |
|  | 1.5 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust   |
| 2. Understand how to work in an ethical manner | 2.1 Explain how to operate in accordance with legal requirements, ethical standards and recognised good practice   |
|  | 2.2 Evaluate how to make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected |
|  | 2.3 Evaluate how to take clear and unequivocal personal responsibility for own decisions   |
|  | 2.4 Explain how to disclose information only to those who have a statutory right to receive it   |
|  | 2.5 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust  |



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| 3. Be able to undertake personal development        | 3.1 Define the personal aims and objectives for undertaking personal development  |
|   | 3.2 Identify and agree sources of support and guidance for undertaking personal development   |
|   | 3.3 Analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs                |
|   | 3.4 Agree a development plan for achieving identified development needs   |
|   | 3.5 Undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                                   |
|   | 3.6 Record evidence of competence gained against the identified standards of competence and review progress against aims and objectives   |
| 4. Understand how to undertake personal development | 4.1 Evaluate how to define the personal aims and objectives for undertaking personal development  |
|   | 4.2 Describe how to identify and agree sources of support and guidance for undertaking personal development   |
|   | 4.3 Examine how to analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs |
|   | 4.4 Evaluate how to agree a development plan for achieving identified development needs   |
|   | 4.5 Evaluate how to undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                   |
|   | 4.6 Explain how to record evidence of competence gained against the identified standards of competence and review progress against aims and objectives  |



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## Pathway 3 - Planning Enforcement

To achieve the ABBE Level 3 NVQ Diploma in Town Planning Technical Support (Planning Enforcement) learners must achieve the five mandatory units and a minimum of two optional units.

### Unit 1PE: Identify and monitor compliance of developments in planning, conservation or building control

Unit Reference Number: D/504/4719

Level: 3

Credit: 14

#### Unit Summary

This unit is about the investigation, analysis and progression of complaints about potential breaches of regulatory control. You will need to be able to understand the range of application types and how they would apply to existing developments so that potential breaches of control can be correctly identified and appropriate action taken.

#### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>               | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to monitor compliance of authorised works        | 1.1 Identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty   |
|   | 1.2 Advise on legal and statutory responsibilities to those responsible for implementing them before they start the development  |
|   | 1.3 Follow an agreed control system, collect information and record it accurately  |
|   | 1.4 Identify situations which do not comply with legal and statutory requirements, investigate and report the circumstances thoroughly to enable the appropriate corrective action to be taken |
|   | 1.5 Identify any new legal and statutory requirements which may have an impact on the development, summarise the important details and pass these on to people who have an interest            |
| 2. Understand how to monitor compliance of authorised works | 2.1 Describe how to identify and interpret legal and statutory requirements from available information and clarify them where there is uncertainty   |
|   | 2.2 Propose how to advise on legal and statutory responsibilities to those responsible for implementing them before they start the development   |



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|   | 2.3 Explain how to follow an agreed control system, collect information and record it accurately   |
|   | 2.4 Describe how to identify situations which do not comply with legal and statutory requirements, investigate and report the circumstances thoroughly to enable the appropriate corrective action to be taken |
|   | 2.5 Describe how to identify any new legal and statutory requirements which may have an impact on the development, summarise the important details and pass these on to people who have an interest            |
| 3. Be able to identify and monitor unauthorised developments        | 3.1 Identify and check unauthorised development against statutory and policy regulations and record them accurately  |
|   | 3.2 Record and summarise information about breaches in compliance and circulate the information to the people responsible for maintaining compliance   |
|   | 3.3 Notify the people responsible for the breach of the possible consequences and steps needed to restore compliance   |
|   | 3.4 Issue standard warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit   |
|   | 3.5 Recommend follow up action in cases of breach of compliance  |
|   | 3.6 Prepare and submit clear and accurate evidence of breaches to decision makers  |
| 4. Understand how to identify and monitor unauthorised developments | 4.1 Describe how to identify and check unauthorised development against statutory and policy regulations and record them accurately  |
|   | 4.2 Explain how to record and summarise information about breaches in compliance and circulate the information to the people responsible for maintaining compliance  |
|   | 4.3 Explain how to notify the people responsible for the breach of the possible consequences and steps needed to restore compliance  |
|   | 4.4 Explain how to issue standard warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit                          |
|   | 4.5 Propose how to recommend follow up action in cases of breach of compliance   |
|   | 4.6 Explain how to prepare and submit clear and accurate evidence of breaches to decision makers   |



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## Unit 2PE: Work in a team in planning, conservation or building control

Unit Reference Number: R/504/4524

Level: 3

Credit: 10

### Unit Summary

This unit is about establishing good working relationships within a team, being mutually supportive of your colleagues and handling conflicts in a constructive manner. A team could be a collaboration of various parties from both within and external to your organisation. You will need to understand the dynamics of team working, have good interpersonal skills and be an effective communicator with customers.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to maintain relationships with people who are affected by your work        | 1. 1 Maintain working relationships and communicate clearly with people to promote goodwill, trust and understanding  |
|   | 1.2 Inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency   |
|   | 1.3 Offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments                       |
|   | 1.4 Present proposals for action clearly to people at an appropriate time and with the right level of detail for the circumstances, expenditure and risk involved |
|   | 1.5 Clarify with people objections to proposals and suggest alternative proposals   |
|   | 1.6 Deal with conflicts and differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding                            |
| 2. Understand how to maintain relationships with people who are affected by your work | 2.1 Explain how to maintain working relationships and communicate clearly with people to promote goodwill, trust and understanding                                |
|   | 2.2 Explain how to inform people about work activities in an appropriate level of detail and with an appropriate degree of urgency                                |
|   | 2.3 Propose how to offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments        |
|   | 2.3 Propose how to offer advice and help to people about work activities with sensitivity and encourage questions, requests for clarification and comments        |



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|                                     | 2.4 Explain how to present proposals for action clearly to people at an appropriate time and with the right level of detail for the circumstances, expenditure and risk involved |
|                                     | 2.5 Explain how to clarify with people objections to proposals and suggest alternative proposals   |
|                                     | 2.6 Explain how to deal with conflicts and differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding                            |
| 3. Be able to work in a team        | 3.1 Confirm the team work plan and responsibilities and methods by which activity will be monitored  |
|                                     | 3.2 Confirm the clear parameters which will enable the team to meet the requirements of the work plan  |
|                                     | 3.3 Co-operate with arrangements to achieve effective communication within the team and with stakeholders  |
|                                     | 3.4 Accept personal responsibilities needed and agree a realistic timescale and resources with the team  |
|                                     | 3.5 Report to team leader on timing, task completion and team processes  |
| 4. Understand how to work in a team | 4.1 Explain how to confirm the team work plan and responsibilities and methods by which activity will be monitored   |
|                                     | 4.2 Explain how to confirm the clear parameters which will enable the team to meet the requirements of the work plan   |
|                                     | 4.3 Explain how to co-operate with arrangements to achieve effective communication within the team and with stakeholders   |
|                                     | 4.4 Evaluate how to accept personal responsibilities needed and agree a realistic timescale and resources with the team  |
|                                     | 4.5 Explain how to report to team leader on timing, task completion and team processes   |



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## Unit 3PE: Process information relevant to breaches of regulation in planning, conservation or building control

Unit Reference Number: R/504/4572

Level: 3

Credit: 10

### Unit Summary

The unit is about the investigation, analysis and progression of complaints about potential breaches of regulatory control. You will need to be able to understand the range of application types and how they would apply to existing developments so that potential breaches of control can be correctly identified and the appropriate action taken. You will also be responsible for preparing briefing material for decision makers and drafting formal responses.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>              | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to gather information relevant to a case        | 1.1 Identify and collate information which is relevant to the potential breach of regulation, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it                 |
|  | 1.2 Obtain information about similar cases, identifying key points and common features and produce an accurate summary   |
|  | 1.3 Identify and evaluate the information which will support the case and summarise and justify it in a reasoned argument  |
|  | 1.4 Consult with interested parties, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required   |
|  | 1.5 Disclose information which is relevant to the case only to those who have a right to see it  |
|  | 1.6 Pass the case to the relevant decision makers within agreed timescales   |
| 2. Understand how to gather information relevant to a case | 2.1 Describe how to identify and collate information which is relevant to the potential breach of regulation, within the time limits, identify potentially inaccurate information and clarify it with the people who produced it |
|  | 2.2 Explain how to obtain information about similar cases, identifying key points and common features and produce an accurate summary  |
|  | 2.3 Describe how to identify and evaluate the information which will support the case and summarise and justify it in a reasoned argument  |



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|  | 2.4 Explain how to consult with interested parties, and provide them with a clear, valid and accurate summary, in cases where expert interpretation and judgement is required |
|  | 2.5 Explain how to disclose information which is relevant to the case only to those who have a right to see it  |
|  | 2.6 Explain how to pass the case to the relevant decision makers within agreed timescales   |
| 3. Be able to progress the resolution of the case        | 3.1 Prepare documents about the potential breach of regulations which have a clear rationale, and which include valid supporting information                                  |
|  | 3.2 Keep regular contact with the people involved in order to progress the case   |
|  | 3.3 Summarise and record points of agreement and disagreement and refer them to decision makers   |
|  | 3.4 Draft agreed formal responses accurately and in a suitable style  |
| 4. Understand how to progress the resolution of the case | 4.1 Explain how to prepare documents about the potential breach of regulations which have a clear rationale, and which include valid supporting information                   |
|  | 4.2 Explain how to keep regular contact with the people involved in order to progress the case  |
|  | 4.3 Explain how to summarise and record points of agreement and disagreement and refer them to decision makers  |
|  | 4.4 Explain how to draft agreed formal responses accurately and in a suitable style   |



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## Unit 4PE: Operate technical information systems in planning, conservation or building control

Unit Reference Number: K/504/4562

Level: 3

Credit: 10

### Unit Summary

This unit is about how you prepare, store and retrieve information. You will need to be able to plan the contents of each document and complete it to the required standard in a timely manner. You will need to be aware of confidentiality considerations. You will need to be able to collate, store and retrieve information in a variety of different ways and keep it up-to-date.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to operate information systems in planning, conservation and building control technical support        | 1.1 Obtain information and organise it into a suitable form for display and use   |
|   | 1.2 Store information using agreed organisational procedures  |
|   | 1.3 Advise and offer guidance to people who are unable to find the information they need and suggest alternative sources                    |
|   | 1.4 Operate the information system by following agreed procedures so that the information system remains reliable and secure                |
|   | 1.5 Record, update, archive and remove information following agreed procedures  |
|   | 1.6 Explain how to obtain information and organise it into a suitable form for display and use to others                                    |
| 2. Understand how to operate information systems in planning, conservation and building control technical support | 2.1 Explain how to obtain information and organise it into a suitable form for display and use  |
|   | 2.2 Explain how to store information using agreed organisational procedures   |
|   | 2.3 Explain how to advise and offer guidance to people who are unable to find the information they need and suggest alternative sources     |
|   | 2.4 Explain how to operate the information system by following agreed procedures so that the information system remains reliable and secure |



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|   | 2.5 Explain how to record, update, archive and remove information following agreed procedures   |
|   | 2.6 Describe how to identify and retrieve information which might be of use to others   |
| 3. Be able to prepare documents to meet specified requirements        | 3.1 Accurately establishing the purpose of the documents  |
|   | 3.2 Complete documents which meet specified requirements  |
|   | 3.3 Ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with organisational requirements                |
|   | 3.4 Ensure that the content of documents is comprehensive and accurate and is presented in a logical sequence                                       |
|   | 3.5 Ensure that recommendations, when required, are succinct and provide sufficient guidance to decision makers                                     |
|   | 3.6 Ensure that sources of information, upon which documents are based, are verified as accurate and valid  |
|   | 3.7 Ensure that work practices are in accordance with legal and regulatory requirements and organisational procedures                               |
|   | 3.8 Record promptly and accurately reasons where work is not achievable within specified deadlines  |
|   | 3.9 Provide completed documents within agreed deadlines   |
|   | 3.10 Maintain security and confidentiality of information   |
| 4. Understand how to prepare documents to meet specified requirements | 4.1 Explain how to accurately establishing the purpose of the documents   |
|   | 4.2 Explain how to complete documents which meet specified requirements   |
|   | 4.3 Explain how to ensure that layout, spelling, grammar and punctuation are correct, consistent and in accordance with organisational requirements |
|   | 4.4 Explain how to ensure that the content of documents is comprehensive and accurate and is presented in a logical sequence                        |
|   | 4.5 Explain how to ensure that recommendations, when required, are succinct and provide sufficient guidance to decision makers                      |



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|  | 4.6 Explain how to ensure that sources of information, upon which documents are based, are verified as accurate and valid            |
|  | 4.7 Explain how to ensure that work practices are in accordance with legal and regulatory requirements and organisational procedures |
|  | 4.8 Explain how to record promptly and accurately reasons where work is not achievable within specified deadlines                    |
|  | 4.9 Explain how to provide completed documents within agreed deadlines   |
|  | 4.10 Explain how to maintain security and confidentiality of information   |



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## Unit 5PE: Operate in a professional manner in planning, conservation or building control

Unit Reference Number: H/504/4561

Level: 3

Credit: 10

### Unit Summary

The unit is about the process of acting in an appropriate professional manner and taking responsibility for your personal development. You will need to carry out your work in line with accepted standards and good practice, taking personal responsibility for your actions, have a clear view of your personal development needs and systematically addressing those needs in a proactive manner.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to work in an ethical manner        | 1.1 Operate in accordance with legal requirements, ethical standards and recognised good practice  |
|  | 1.2 Make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected                 |
|  | 1.3 Take clear and unequivocal personal responsibility for own decisions   |
|  | 1.4 Disclose information only to those who have a statutory right to receive it  |
|  | 1.5 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust   |
| 2. Understand how to work in an ethical manner | 2.1 Explain how to operate in accordance with legal requirements, ethical standards and recognised good practice   |
|  | 2.2 Evaluate how to make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected |
|  | 2.3 Evaluate how to take clear and unequivocal personal responsibility for own decisions   |
|  | 2.4 Explain how to disclose information only to those who have a statutory right to receive it   |
|  | 2.5 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust  |



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| 3. Be able to undertake personal development        | 3.1 Define the personal aims and objectives for undertaking personal development  |
|   | 3.2 Identify and agree sources of support and guidance for undertaking personal development   |
|   | 3.3 Analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs                |
|   | 3.4 Agree a development plan for achieving identified development needs   |
|   | 3.5 Undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                                   |
|   | 3.6 Record evidence of competence gained against the identified standards of competence and review progress against aims and objectives   |
| 4. Understand how to undertake personal development | 4.1 Evaluate how to define the personal aims and objectives for undertaking personal development  |
|   | 4.2 Describe how to identify and agree sources of support and guidance for undertaking personal development   |
|   | 4.3 Examine how to analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs |
|   | 4.4 Evaluate how to agree a development plan for achieving identified development needs   |
|   | 4.5 Evaluate how to undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                   |
|   | 4.6 Explain how to record evidence of competence gained against the identified standards of competence and review progress against aims and objectives  |



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## Unit 6PE: Organise consultation and community engagement in planning or conservation

Unit Reference Number: Y/504/4718

Level: 3

Credit: 8

### Unit Summary

This unit is about designing, carrying out, recording and presenting the results of engagement and consultation exercises with stakeholders and community groups in order to inform the development of policy and decision making. You will need to be familiar with best practice consultation and engagement techniques, have good organisational skills as well as effective recording and reporting abilities.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                       | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to organise consultation and community engagement        | 1.1 Identify and prioritise the outcomes to be achieved by the proposed consultation, ensuring that these are in line with organisational requirements   |
|   | 1.2 Identify the stakeholders and community groups who are likely to be involved in and affected by the proposed consultation  |
|   | 1.3 Plan and set up methods of consultation which will ensure that all relevant stakeholders and community groups are engaged  |
|   | 1.4 Present the consultation proposals to people and groups who are interested and informed, and summarise their feedback  |
|   | 1.5 Record and analyse the feedback against relevant criteria, identify the conflicting needs of different groups and users, the level of support and opposition, and describe how these needs might affect the consultation |
|   | 1.6 Summarise the results of the consultations, and present the results to relevant decision-makers, stakeholders and community groups   |
| 2. Understand how to organise consultation and community engagement | 2.1 Describe how to identify and prioritise the outcomes to be achieved by the proposed consultation, ensuring that these are in line with organisational requirements   |
|   | 2.2 Describe how to identify the stakeholders and community groups who are likely to be involved in and affected by the proposed consultation  |



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|  | 2.3 Propose how to plan and set up methods of consultation which will ensure that all relevant stakeholders and community groups are engaged  |
|  | 2.4 Explain how to present the consultation proposals to people and groups who are interested and informed, and summarise their feedback  |
|  | 2.5 Explain how to record and analyse the feedback against relevant criteria, identify the conflicting needs of different groups and users, the level of support and opposition, and describe how these needs might affect the consultation |
|  | 2.6 Explain how to summarise the results of the consultations, and present the results to relevant decision-makers, stakeholders and community groups   |



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## Unit 7PE: Provide technical support in planning, conservation or building control

Unit Reference Number: A/504/4548

Level: 3

Credit: 12

### Unit Summary

This unit is about providing technical advice to the public either upon reception, by phone or through written communication and the checking and initial processing of applications. You will need to have a good understanding of the range of application types, what they should comprise and be able to advise the public on a range of technical issues associated with your field.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to respond to requests for information about proposals, processes and requirements        | 1.1 Identify the main areas of legislation, regulations, procedures and values applicable to the area of work  |
|  | 1.2 Ensure that reliable and up-to-date sources of relevant information are readily available for reference and guidance   |
|  | 1.3 Interpret accurately the nature of proposals, processes and requirements from available information  |
|  | 1.4 Notify the people involved and seek competent advice where there is uncertainty about the correct interpretation of proposals, processes and requirements                |
|  | 1.5 Respond promptly to requests for information related to proposals, processes and requirements  |
|  | 1.6 Collect all relevant available required information about proposals, processes and requirements  |
|  | 1.7 Carry out the relevant research where the necessary information is not immediately available   |
|  | 1.8 Provide the requested information accurately and appropriately to the needs of the enquirers involved and the situation  |
| 2. Understand how to respond to requests for information about proposals, processes and requirements | 2.1 Describe how to identify the main areas of legislation, regulations, procedures and values applicable to the area of work  |
|  | 2.2 Explain how to ensure that reliable and up-to-date sources of relevant information are readily available for reference and guidance                                      |
|  | 2.3 Examine how to interpret accurately the nature of proposals, processes and requirements from available information   |
|  | 2.4 Explain how to notify the people involved and seek competent advice where there is uncertainty about the correct interpretation of proposals, processes and Requirements |



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|   | 2.5 Explain how to respond promptly to requests for information related to proposals, processes and requirements                           |
|   | 2.6 Explain how to collect all relevant available required information about proposals, processes and requirements                         |
|   | 2.7 Examine how to carry out the relevant research where the necessary information is not immediately available                            |
|   | 2.8 Explain how to provide the requested information accurately and appropriately to the needs of the enquirers involved and the situation |
| 3. Be able to administer statutory processes        | 3.1 Check application documentation for completeness   |
|   | 3.2 Take agreed procedural action in response to missing application documentation or insufficiency of information                         |
|   | 3.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements              |
|   | 3.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements              |
|   | 3.4 Categorise applications based on all available information   |
|   | 3.5 Add information to files and systems in line with agreed procedures  |
|   | 3.6 Pass applications to the next stage of the process   |
| 4. Understand how to administer statutory processes | 4.1 Explain how to check application documentation for Completeness  |
|   | 4.2 Explain how to take agreed procedural action in response to missing application documentation or insufficiency of information          |
|   | 4.3 Examine and identify proposals and procedures that may not conform to relevant legislation or organisational requirements              |
|   | 4.4 Explain how to categorise applications based on all available information  |
|   | 4.5 Explain how to add information to files and systems in line with agreed procedures   |
|   | 4.6 Explain how to pass applications to the next stage of the process  |



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## Unit 8PE: Process applications to secure grant and other funding in planning or conservation

Unit Reference Number: J/504/4519

Level: 3

Credit: 8

### Unit Summary

This unit is about the receiving, validating and processing of applications for grants and other sources of funding from your organisation. You will need to be aware of the procedures involved in processing applications, what the criteria are for decision making and how to prepare the application for the decision maker.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                        | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to process applications to secure grant and other funding | 1.1 Acknowledge applications for grants promptly and check them against statutory and policy requirements   |
|  | 1.2 Identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof   |
|  | 1.3 Check applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria for approval by decision makers                                     |
|  | 1.4 Refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants  |
|  | 1.4 Refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers, and prepare a justified rejection to send to unsuccessful applicants |
|  | 1.5 Issue and record decisions clearly, draft the conditions in an agreed format and pass it on to the applicant  |
|  | 1.6 Check that applicants are complying with the conditions applying to grants, identify those who are not and advise them on what they need to do to comply with the conditions  |



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|   | 1.7 Complete the administration of the decision making process within the time allowed to meet statutory and policy requirements  |
| 2. Understand how to process applications to secure grant and other funding | 2.1 Explain how to acknowledge applications for grants promptly and check them against statutory and policy requirements  |
|   | 2.2 Describe how to identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof   |
|   | 2.3 Explain how to check applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria for approval by decision makers                                    |
|   | 2.4 Explain how to refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants |
|   | 2.4 Explain how to refer applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision to decision makers and prepare a justified rejection to send to unsuccessful applicants |
|   | 2.5 Explain how to issue and record decisions clearly, draft the conditions in an agreed format and pass it on to the applicant   |
|   | 2.6 Explain how to check that applicants are complying with the conditions applying to grants, identify those who are not and advise them on what they need to do to comply with the conditions   |
|   | 2.7 Explain how to complete the administration of the decision making process within the time allowed to meet statutory and policy requirements   |



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## Unit 9PE: Prepare applications grant and other funding in planning or conservation

Unit Reference Number: A/504/4520

Level: 4

Credit: 9

### Unit Summary

This unit is about the process of making applications to government, the European Union, the National Lottery and other organisations for grants to enable your organisation to fund projects. You will need to understand the range of grants available, the criteria and timescales involved and their suitability for your organisation's purposes.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>               | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to prepare applications to secure funding        | 1.1 Calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints                     |
|   | 1.2 Identify which aspects of a project satisfy the eligibility criteria for incentive schemes  |
|   | 1.3 Check and confirm with the approving body the requirements, current procedures and likely timescale   |
|   | 1.4 Forecast how long the submission and approval of an application for incentives will take and how this will fit in with the project schedule |
|   | 1.5 Identify the implications of delays, failure to apply for and achieve approval and circulating the information to stakeholders              |
|   | 1.6 Prepare and assemble the information that will be needed for the application  |
|   | 1.7 Prepare and submit a clear and valid application for the incentives   |
|   | 1.8 Provide the approving bodies with additional clear, relevant and accurate information when it is requested                                  |
|   | 1.9 Negotiate with approving bodies to secure incentives  |
| 2. Understand how to prepare applications to secure funding | 2.1 Explain how to calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints      |
|   | 2.2 Describe how to identify which aspects of a project satisfy the eligibility criteria for incentive schemes                                  |



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|  | 2.3 Explain how to check and confirm with the approving body the requirements, current procedures and likely timescale   |
|  | 2.4 Examine how to forecast how long the submission and approval of an application for incentives will take and how this will fit in with the project schedule |
|  | 2.5 Describe how to identify the implications of delays, failure to apply for and achieve approval and circulating the information to the stakeholders         |
|  | 2.6 Explain how to prepare and assemble the information that will be needed for the application  |
|  | 2.7 Describe how to prepare and submit a clear and valid application for the incentives  |
|  | 2.8 Describe how to provide the approving bodies with additional clear, relevant and accurate information when it is requested                                 |
|  | 2.9 Propose how to negotiate with approving bodies to secure incentives  |



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## Unit 10PE: Process and consult on applications to reflect statutory and policy requirements in planning, conservation or building control

Unit Reference Number: F/504/4521

Level: 3

Credit: 14

### Unit Summary

This unit is about the receipt, checking, validation and process of applications, including, where relevant, the carrying out of the consultation, publicity and notification. You will need to have a good understanding of the range of application types, what they should comprise, who will need to be consulted and the procedures involved in their processing.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to process and consult on applications to reflect statutory and policy requirements        | 1.1 Process applications promptly and check them against statutory and policy requirements   |
|   | 1.2 Identify inconsistent and incomplete information in applications and ask applicants for more information                           |
|   | 1.3 Check applications in detail against the relevant technical policy and evaluation criteria   |
|   | 1.4 Identify appropriate consultees and other interested parties on their application in relation to statutory and policy requirements |
|   | 1.5 Initiate consultation with interested parties and monitor process  |
|   | 1.6 Collect information and refer checked applications to decision makers within the time allowed and to meet legal requirements       |
|   | 1.7 Collate responses to the consultation and refer them to decision makers within the time allowed and to meet legal requirements     |
|   | 1.8 Prepare, check, issue and record decisions and inform applicants and other parties in an appropriate form                          |
| 2. Understand how to process and consult on applications to reflect statutory and policy requirements | 2.1 Explain how to process applications promptly and check them against statutory and policy requirements                              |
|   | 2.2 Describe how to identify inconsistent and incomplete information in applications and ask applicants for more information           |
|   | 2.3 Explain how to check applications in detail against the relevant technical policy and evaluation criteria                          |



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|  | 2.4 Describe how to identify appropriate consultees and other interested parties on their application in relation to statutory and policy requirements |
|  | 2.5 Propose how to initiate consultation with interested parties and monitor process   |
|  | 2.6 Explain how to collect information and refer checked applications to decision makers within the time allowed and to meet legal requirements        |
|  | 2.7 Explain how to collate responses to the consultation and refer them to decision makers within the time allowed and to meet legal requirements      |
|  | 2.8 Explain how to prepare, check, issue and record decisions and inform applicants and other parties in an appropriate form                           |



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## Unit 11PE: Carry out measured survey in planning, conservation or building control

Unit Reference Number: Y/504/4721

Level: 3

Credit: 15

### Unit Summary

This unit is concerned with conducting a measured survey on land or buildings. You will need to be able to collect, check and verify survey data. You will need to check your results, and present them in a way that helps the user.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b> | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to prepare for survey operations   | 1.1 Identify what survey information is needed, how accurate the information needs to be and what information outputs are required from the survey      |
|   | 1.2 Analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed              |
|   | 1.3 Confirm with the people who will be affected that the survey method statement is accurate before starting the work                                  |
|   | 1.4 Check and confirm that a risk assessment is relevant and in place   |
|   | 1.5 Arrange for suitable equipment, and enough spares for maintenance, to be available and kept safely and securely                                     |
|   | 1.6 Check and confirm, before starting work, that people who will be affected have given their permission   |
|   | 1.7 Brief the people who will be involved in the survey about the survey arrangements and the safety arrangements                                       |
|   | 1.8 Contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation |
|   | 1.9 Check and confirm that signs, arrangements for safety, equipment and site access conform to good practice, legislation and regulation               |



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| 2. Understand how to prepare for survey operations | 2.1 Describe how to identify what survey information is needed, how accurate the information needs to be and what information outputs are required from the survey     |
|  | 2.2 Examine how to analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed              |
|  | 2.3 Explain how to confirm with the people who will be affected that the survey method statement is accurate before starting the work                                  |
|  | 2.4 Explain how to check and confirm that a risk assessment is relevant and in place   |
|  | 2.5 Explain how to arrange for suitable equipment, and enough spares for maintenance, to be available and kept safely and securely                                     |
|  | 2.6 Explain how to check and confirm, before starting work, that people who will be affected have given their permission   |
|  | 2.7 Explain how to brief the people who will be involved in the survey about the survey arrangements and the safety arrangements                                       |
|  | 2.8 Explain how to contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation |
|  | 2.9 Explain how to check and confirm that signs, arrangements for safety, equipment and site access conform to good practice, legislation and regulation               |
| 3. Be able to conduct measured surveys             | 3.1 Conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum                            |
|  | 3.2 Conform to safe working practices  |
|  | 3.3 Consult with experts when specialist information is needed which is relevant to the survey   |
|  | 3.4 Take accurate observations and measurements using valid methods  |
|  | 3.5 Change work procedures and practices to allow for different circumstances and conditions   |
|  | 3.6 Record survey data clearly and accurately and store it securely for later analysis   |
|  | 3.7 Keep a clear and accurate record of the time spent on the survey and of any problems that come up which may affect cost or accuracy                                |



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|   | 3.8 Maintain the equipment in operating condition and store it securely  |
| 4. Understand how to conduct measured surveys | 4.1 Explain how to conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum |
|   | 4.2 Explain how to conform to safe working practices   |
|   | 4.3 Explain how to consult with experts when specialist information is needed which is relevant to the survey  |
|   | 4.4 Explain how to take accurate observations and measurements using valid methods   |
|   | 4.5 Explain how to change work procedures and practices to allow for different circumstances and conditions  |
|   | 4.6 Explain how to record survey data clearly and accurately and store it securely for later analysis  |
|   | 4.7 Explain how to keep a clear and accurate record of the time spent on the survey and of any problems that come up which may affect cost or accuracy     |
|   | 4.8 Explain how to maintain the equipment in operating condition and store it securely   |



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## Unit 12PE: Carry out an environmental survey in planning, conservation or building control

Unit Reference Number: A/504/4534

Level: 3

Credit: 15

### Unit Summary

This unit is about the preparation, carrying out, recording analysing and presentations of all kinds of surveys. You will need to understand the purpose of the survey, so that the best methods and techniques are used to provide the information that is necessary to achieve the results that the organisation needs.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>            | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to prepare for an environmental survey        | 1.1 Confirm the purpose of the survey and significant factors affecting it  |
|  | 1.2 Check and confirm that a risk assessment is relevant and in place   |
|  | 1.3 Confirm any permission(s) that will be needed to carry out the survey and confirm that they are valid before the survey starts                                      |
|  | 1.4 Contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their cooperation                 |
|  | 1.5 Confirm methods and techniques for the survey which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public       |
|  | 1.6 Check and confirm that signs, arrangements for personal safety, equipment and site access conform to good practice, legislation and regulation                      |
| 2. Understand how to prepare for an environmental survey | 2.1 Explain how to confirm the purpose of the survey and significant factors affecting it   |
|  | 2.2 Explain how to check and confirm that a risk assessment is relevant and in place  |
|  | 2.3 Explain how to confirm any permission(s) that will be needed to carry out the survey and confirm that they are valid before the survey starts                       |
|  | 2.4 Explain how to contact people and organisations who will be affected by the survey, provide them with clear and accurate information and ask for their co-operation |



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|  | 2.5 Explain how to confirm methods and techniques for the survey which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public                   |
|  | 2.6 Explain how to check and confirm that signs, arrangements for personal safety, equipment and site access conform to good practice, legislation and regulation                                  |
| 3. Be able to conduct environmental surveys        | 3.1 Identify survey sources and collect and collate relevant data following safe working practices   |
|  | 3.2 Accurately analyse the data which has been collected about all of the significant factors related to the purpose of the survey   |
|  | 3.3 Consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems   |
|  | 3.4 Record accurate findings which are unambiguous, which clearly describe all the important factors in a format which is suitable for circulation and discussion with stakeholders                |
|  | 3.5 State clearly the authority for assumptions and projections  |
|  | 3.6 Assemble any supporting data which is relevant to the study, but which is not included in the report, store it safely and index it clearly for future reference                                |
| 4. Understand how to conduct environmental surveys | 4.1 Describe how to identify survey sources and collect and collate relevant data following safe working practices   |
|  | 4.2 Examine how to accurately analyse the data which has been collected about all of the significant factors related to the purpose of the survey  |
|  | 4.3 Explain how to consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems                                    |
|  | 4.4 Explain how to record accurate findings which are unambiguous, which clearly describe all the important factors in a format which is suitable for circulation and discussion with stakeholders |
|  | 4.5 Explain how to state clearly the authority for assumptions and projections   |
|  | 4.6 Explain how to assemble any supporting data which is relevant to the study, but which is not included in the report, store it safely and index it clearly for future reference                 |



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## Unit 13PE: Compile and present survey data in planning or building control

Unit Reference Number: J/504/4567

Level: 3

Credit: 12

### Unit Summary

This unit is concerned with presenting the results of a survey of any kind of land or buildings. You will need to be able to collect, check and verify survey data. You will need to check your results, and present them in a way that helps the user.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b> | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to compile survey data             | 1.1 Confirm that the survey data is appropriate for the intended purpose   |
|   | 1.2 Check data selected from all the specified sources and reject invalid data   |
|   | 1.3 Conform to data security and quality assurance requirements  |
|   | 1.4 Confirm terms for permission to use data, including copyright  |
|   | 1.5 Confirm the requirements for compilation material and maintain complete and accurate compilation records and histories throughout the project                |
|   | 1.6 Extract, compile and compute data accurately and in a suitable form for analysing and presentation   |
| 2. Understand how to compile survey data      | 2.1 Explain how to confirm that the survey data is appropriate for the intended purpose  |
|   | 2.2 Explain how to check data selected from all the specified sources and reject invalid data  |
|   | 2.3 Explain how to conform to data security and quality assurance requirements   |
|   | 2.4 Explain how to confirm terms for permission to use data, including copyright   |
|   | 2.5 Explain how to confirm the requirements for compilation material and maintain complete and accurate compilation records and histories throughout the project |
|   | 2.6 Explain how to extract, compile and compute data accurately and in a suitable form for analysing and presentation  |



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| 3. Be able to analyse and present survey results        | 3.1 Collect together enough survey data to allow an accurate analysis to be made  |
|   | 3.2 Verify the survey data and adjust the data to maintain accuracy and integrity   |
|   | 3.3 Analyse the survey data accurately  |
|   | 3.4 Present the results of the survey information, the commentary and any support information accurately, clearly and in a format which is suitable for those who need to use it                |
| 4. Understand how to analyse and present survey results | 4.1 Explain how to collect together enough survey data to allow an accurate analysis to be made   |
|   | 4.2 Examine how to verify the survey data and adjust the data to maintain accuracy and integrity  |
|   | 4.3 Examine how to analyse the survey data accurately   |
|   | 4.4 Explain how to present the results of the survey information, the commentary and any support information accurately, clearly and in a format which is suitable for those who need to use it |



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## Unit 14PE: Investigate and assess regulatory factors affecting potential developments in planning, conservation or building control

Unit Reference Number: J/504/4570

Level: 3

Credit: 12

### Unit Summary

This unit is about demonstrating your ability to investigate the requirements of the planning and other regulatory authorities, reporting the valid options and obtaining the required statutory consents for developments. You will need to investigate the requirements of the planning and regulatory authorities which apply to the development. You will also be required to produce a report which identifies the options available and the legal implications and which includes providing supporting data and giving advice on the implications of the report.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>                         | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to identify regulatory requirements and constraints        | 1.1 Identify the requirements of planning and other regulatory bodies which have an interest in key factors of the development                 |
|   | 1.2 Identify and assess the relative importance of existing and anticipated regulations  |
|   | 1.3 Identify and review opportunities and constraints which could result from both existing and anticipated regulations                        |
|   | 1.4 Summarise any regulatory constraints which might affect the viability of the development   |
| 2. Understand how to identify regulatory requirements and constraints | 2.1 Describe how to identify the requirements of planning and other regulatory bodies which have an interest in key factors of the development |
|   | 2.2 Describe how to identify and assess the relative importance of existing and anticipated regulations  |
|   | 2.3 Describe how to identify and review opportunities and constraints which could result from both existing and anticipated regulations        |
|   | 2.4 Explain how to summarise any regulatory constraints which might affect the viability of the development                                    |



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| 3. Be able to report and advise on potential developments        | 3.1 Identify and assess existing solutions which are similar to the regulatory constraints which may apply to the development  |
|  | 3.2 Investigate and test the requirements and preferences of planning and other regulatory bodies which have an interest in key development factors and report valid options and objections to the stakeholders                |
|  | 3.3 Match findings which have legal implications to relevant legislation and related guidance  |
|  | 3.4 Produce an accurate and unambiguous report based on the investigation findings which clearly identifies the options available  |
|  | 3.6 Provide clear and accurate advice on the findings and implications of the investigation, to stakeholders   |
| 4. Understand how to report and advise on potential developments | 4.1 Describe how to identify and assess existing solutions which are similar to the regulatory constraints which may apply to the development  |
|  | 4.2 Examine how to investigate and test the requirements and preferences of planning and other regulatory bodies which have an interest in key development factors and report valid options and objections to the stakeholders |
|  | 4.3 Propose how to match findings which have legal implications to relevant legislation and related guidance   |
|  | 4.4 Explain how to produce an accurate and unambiguous report based on the investigation findings which clearly identifies the options available   |
|  | 4.5 Explain how to assemble any supporting data which is relevant to the investigation, but which is not included in the report, store it safely and index it clearly for future reference                                     |
|  | 4.6 Propose how to provide clear and accurate advice on the findings and implications of the investigation, to stakeholders  |



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## Unit 15PE: Prepare graphical information in planning, conservation or building control

Unit Reference Number: L/504/4571

Level: 3

Credit: 11

### Unit Summary

This unit requires you to be able to complete drawings and graphics that are accurate and fit for purpose. In a planning context this unit concerns the production of drawings and graphics to illustrate or present a particular planning scheme (including development proposals, plans, strategies and planning options) and a particular conservation or building regulation scheme.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>      | <b>Assessment Criterion<br/>The learner can:</b>  |
|--|---|
| 1. Be able to produce graphical information        | 1.1 Agree with the project team and the decision makers the purpose of the presentation and the presentation materials which will be used                 |
|  | 1.2 Select methods and media which are suitable for the graphics required, and which can be produced with the resources and time available                |
|  | 1.3 Use standard drawing conventions and identify and justify any deviations from them  |
|  | 1.4 Produce graphics which are complete, accurate, and comply with the design information and which are suitable for the purpose                          |
|  | 1.5 Clarify any information to be included which is incomplete and inconsistent and make accurate amendments  |
|  | 1.6 Keep registers and records of graphics which are complete, accurate and up-to-date  |
|  | 1.7 Obtain necessary checks and approvals for the content and presentation of graphics  |
|  | 1.8 Use methods for production and record keeping which are consistent with quality assurance procedures  |
| 2. Understand how to produce graphical information | 2.1 Evaluate how to agree with the project team and the decision makers the purpose of the presentation and the presentation materials which will be used |



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|  | 2.2 Evaluate how to select methods and media which are suitable for the graphics required, and which can be produced with the resources and time available |
|  | 2.3 Explain how to use standard drawing conventions and identify and justify any deviations from them  |
|  | 2.4 Explain how to produce graphics which are complete, accurate, and comply with the design information and which are suitable for the purpose            |
|  | 2.5 Explain how to clarify any information to be included which is incomplete and inconsistent and make accurate amendments                                |
|  | 2.6 Explain how to keep registers and records of graphics which are complete, accurate and up- to-date   |
|  | 2.7 Explain how to obtain necessary checks and approvals for the content and presentation of graphics  |
|  | 2.8 Explain how to use methods for production and record keeping which are consistent with quality assurance procedures                                    |



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## Unit 16PE: Prepare applications and appeals to secure approvals and statutory consent in planning or conservation

Unit Reference Number: F/504/4566

Level: 3

Credit: 12

### Unit Summary

This unit is concerned with preparing applications to secure approvals and consents. You will need to check and confirm with approving bodies the requirements, procedures and likely timescales for the approval of incentives. You will also need to prepare and submit the applications.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>   | <b>Assessment Criterion<br/>The learner can:</b>  |
|---|---|
| 1. Be able to prepare and submit applications to secure approvals and consents        | 1.1 Identify which aspects of the project are subject to statutory controls and will need consents  |
|   | 1.2 Check and confirm with the relevant authorities the requirements, current procedures and likely timescale for statutory approvals and other consents                |
|   | 1.3 Forecast how long the submission and approval of applications for consent will take and how this will fit in with the project schedule                              |
|   | 1.4 Identify the implications of delays, failure to apply for and achieve consent and circulate the information to the stakeholders                                     |
|   | 1.5 Prepare and assemble the information that will be needed for the application  |
|   | 1.6 Prepare and submit a clear and valid application for the consent  |
|   | 1.7 Provide the consent authorities with additional clear, relevant and accurate information when it is requested   |
|   | 1.8 Manage negotiations with consent authorities to secure consents   |
|   | 1.9 Plan and agree alternatives with the client in anticipation of approval being refused   |
| 2. Understand how to prepare and submit applications to secure approvals and consents | 2.1 Describe how to identify which aspects of the project are subject to statutory controls and will need consents  |
|   | 2.2 Explain how to check and confirm with the relevant authorities the requirements, current procedures and likely timescale for statutory approvals and other consents |



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|  |   |
|--|---|
|  | 2.3 Examine how to forecast how long the submission and approval of applications for consent will take and how this will fit in with the project schedule |
|  | 2.4 Describe how to identify the implications of delays, failure to apply for and achieve consent and circulate the information to the stakeholders       |
|  | 2.5 Explain how to prepare and assemble the information that will be needed for the application   |
|  | 2.6 Explain how to prepare and submit a clear and valid application for the consent   |
|  | 2.7 Explain how to provide the consent authorities with additional clear, relevant and accurate information when it is requested                          |
|  | 2.8 Evaluate how to manage negotiations with consent authorities to secure consents   |
|  | 2.9 Propose how to plan and agree alternatives with the client in anticipation of approval being refused  |



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## Unit 17PE: Identify low carbon energy sources in planning, conservation or building control

Unit Reference Number: M/504/4563

Level: 3

Credit: 14

### Unit Summary

This unit is about reviewing the benefits of using low carbon energy sources on a project within the context of current legislative and policy frameworks. This may involve using standardised toolkits. You will need to present and discuss your recommendations with stakeholders.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>           | <b>Assessment Criterion<br/>The learner can:</b>   |
|---|--|
| 1. Be able to identify low carbon energy sources        | 1.1 Identify the range of low carbon energy sources required in the context of current legislative and policy frameworks                 |
|   | 1.2 Gather information about the scope for using low carbon energy sources   |
|   | 1.3 Review and identify the range of low carbon energy sources and the implications for the project                                      |
|   | 1.4 Identify which low carbon energy sources are likely to provide the best outcome for the project                                      |
|   | 1.5 Present and discuss recommendations with stakeholders  |
| 2. Understand how to identify low carbon energy sources | 2.1 Describe how to identify the range of low carbon energy sources required in the context of current legislative and policy frameworks |
|   | 2.2 Explain how to gather information about the scope for using low carbon energy sources  |
|   | 2.3 Examine how to review and identify the range of low carbon energy sources and the implications for the project                       |
|   | 2.4 Describe how to identify which low carbon energy sources are likely to provide the best outcome for the project                      |
|   | 2.5 Explain how to present and discuss recommendations with Stakeholders   |



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## Unit 18PE: Prepare for and participate in meetings in planning, conservation or building control

Unit Reference Number: D/504/4560

Level: 3

Credit: 10

### Unit Summary

This unit is about organising and participating in meetings. You will need to ensure that the venue and facilities are organised. You will also need to prepare and circulate the agenda and papers. You will also need to produce and circulate a record of the meeting. You need to prepare for meetings, participate effectively in them and ensure that any follow up actions are taken.

### Assessment Guidance

This unit can be assessed using the following method(s):

- Portfolio of evidence

| <b>Learning Outcome<br/>The learner will:</b>  | <b>Assessment Criterion<br/>The learner can:</b>   |
|--|--|
| 1. Be able to work in an ethical manner        | 1.1 Operate in accordance with legal requirements, ethical standards and recognised good practice  |
|  | 1.2 Make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected                 |
|  | 1.3 Take clear and unequivocal personal responsibility for own decisions   |
|  | 1.4 Disclose information only to those who have a statutory right to receive it  |
|  | 1.5 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust   |
| 2. Understand how to work in an ethical manner | 2.1 Explain how to operate in accordance with legal requirements, ethical standards and recognised good practice   |
|  | 2.2 Evaluate how to make judgements and offer advice which balance the needs of the stakeholder, the resources available and the needs of people in the community who are directly and indirectly affected |
|  | 2.3 Evaluate how to take clear and unequivocal personal responsibility for own decisions   |
|  | 2.4 Explain how to disclose information only to those who have a statutory right to receive it   |
|  | 2.5 Explain how to communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust  |
| 3. Be able to undertake personal development   | 3.1 Define the personal aims and objectives for undertaking personal development   |



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|   |   |
|---|---|
|   | 3.2 Identify and agree sources of support and guidance for undertaking personal development   |
|   | 3.3 Analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs                |
|   | 3.4 Agree a development plan for achieving identified development needs   |
|   | 3.5 Undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                                   |
|   | 3.6 Record evidence of competence gained against the identified standards of competence and review progress against aims and objectives   |
| 4. Understand how to undertake personal development | 4.1 Evaluate how to define the personal aims and objectives for undertaking personal development  |
|   | 4.2 Describe how to identify and agree sources of support and guidance for undertaking personal development   |
|   | 4.3 Examine how to analyse the current personal level of performance against the prescribed standards of competence and record a profile of present competence and personal development needs |
|   | 4.4 Evaluate how to agree a development plan for achieving identified development needs   |
|   | 4.5 Evaluate how to undertake development activities aimed at achieving identified development needs, reviewing and record progress and the effectiveness of the activities                   |
|   | 4.6 Explain how to record evidence of competence gained against the identified standards of competence and review progress against aims and objectives  |



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