



**Level 6 NVQ Diploma in  
Conservation**

**Qualification Specification**

Qualification Recognition Number: 600/9048/0

ABBE Qualification Code: DipCL613

**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

This document is copyright under the Berne Convention. All rights are reserved. Apart from any fair dealing for the purposes of private study, research, criticism or review, as permitted under the Copyright, Designs and Patents Act 1998, no part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, electrical, chemical, mechanical, optical, photocopying, recording or otherwise, without prior written permission of the copyright owner. Enquiries should be addressed to Awarding Body for Building Education (ABBE).

Copyright © ABBE 2019



ABBE is a wholly owned subsidiary of Birmingham City University

# Contents

## 1. ABBE

1.1 Introduction	4
1.2 ABBE Mission Statement	4
1.3 Qualification Specification	4
1.4 Enquiries	4

## 2. Qualification Information

2.1 Qualification Purpose	5
2.2 Who can take this qualification?	5
2.3 Qualification number	5
2.4 Qualification level	5
2.5 Total Qualification Time (TQT)	5
2.6 Progression	5
2.7 Age ranges	6
2.8 Structure of qualification	6
2.9 Barred units	8
2.10 Language	8
2.11 Grading	8
2.12 Pre-course procedures	8
2.13 Qualification Review Boards	8

## 3. Qualification Unit(s)

3.1 Qualification unit(s)	9
---------------------------	---



ABBE is a wholly owned subsidiary of Birmingham City University

# 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: [www.abbega.co.uk](http://www.abbega.co.uk)

## 1.2 Mission Statement

**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

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.

## 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)



ABBE is a wholly owned subsidiary of Birmingham City University

## 2. Qualification Information

### 2.1 Qualification Purpose

The ABBE Level 6 NVQ Diploma in Conservation (QCF) is for those working in the field of Conservation. This may involve dealing with a variety of tasks whether submitting or assessing applications, or advising and or organising projects. They may be working for local authorities and other public organisations, or as approved inspectors or working in private sector consultancies.

The purpose of the qualification is to confirm occupational competence.

### 2.2 Who could take this Qualification?

This qualification is for all learners aged 18 and above who are capable of reaching the required standards. Learners do not need any prior qualifications, knowledge or experience before starting the qualification.

This qualification can be taken as preparation for employment into this specialist sector as well as professional development for those interested in specialising in this area.

### 2.3 Qualification Number

ABBE Level 6 NVQ Diploma in Conservation: 600/9048/0

### 2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 6

### 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: 245
- 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



ABBE is a wholly owned subsidiary of Birmingham City University

## 2.7 Age ranges

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

## 2.8 Structure of the Qualification

This qualification has two pathways, each with six mandatory units. To achieve this qualification learners must achieve the six mandatory from either the Culture or Condition pathway plus 12 credits from the optional units.

### Pathway 1 - Culture

Culture Mandatory Unit				
Unit Number/URN	Unit Name	Credit Value	Level	
1CUL	A/504/6865	Identify and assess significant factors influencing the project proposals in conservation and building control	4	6
2CUL	J/504/6870 **Optional in Condition	Analyse research and report on historic and heritage assets in conservation	6	6
3CUL	L/504/6871	Develop and advise on conservation, repair and maintenance strategies and solutions	8	6
4CUL	H/504/6875	Manage quality and cost variations in conservation projects	6	6
5CUL	D/504/6888	Provide ethical advice, judgement and service in planning, conservation and building control	7	6
6CUL	H/504/6889	Advance and develop occupational knowledge and practice in planning, conservation and building control	6	6

### Pathway 2 – Condition

Mandatory Unit				
Unit Number/URN	Unit Name	Credit Value	Level	
1CON	A/504/6865	Identify and assess significant factors influencing the project proposals in conservation and building control	4	6
2CON	L/504/6871	Develop and advise on conservation, repair and maintenance strategies and solutions	8	6
3CON	H/504/6875	Manage quality and cost variations in conservation projects	6	6
4CON	A/504/6879 *Optional in Culture	Survey, assess and record the condition of assets in conservation	6	6
5CON	D/504/6888	Provide ethical advice, judgement and service in planning, conservation and building control	7	6
6CON	H/504/6889	Advance and develop occupational knowledge and practice in planning, conservation and building control	6	6



ABBE is a wholly owned subsidiary of Birmingham City University

## Optional Units

Learners must achieve 12 credits from these optional units as well as the six mandatory from either the Culture or Condition pathway:

Unit Number/URN		Unit Name	Credit Value	Level
7	K/504/6831	Analyse changes in the environment in planning and conservation	6	6
8	J/504/6836	Identify and consult on strategy options in planning and conservation	6	6
9	R/504/6841	Frame sustainable development policies in planning and conservation	6	6
10	H/504/6844	Monitor the implementation of development policies in planning and conservation	4	6
11	M/504/6846	Assess the sustainability of proposals in planning and conservation	4	6
12	F/504/6849	Provide advice to the public about policy, regulations and processes in conservation	4	5
13	A/504/6851	Manage and implement incentive schemes in planning and conservation	4	6
14	F/504/6852	Determine and negotiate proposals in planning, conservation and building control	8	6
15	J/504/6853	Monitor compliance with statutory and policy requirements in planning, conservation and building control	5	6
16	L/504/6854	Identify and evaluate community factors in planning and conservation	4	6
17	D/504/6857	Agree a procurement method with stakeholders and analyse the use and procurement of resources in planning and conservation	6	6
18	H/504/6858	Prepare project briefs and plans in planning and conservation	8	6
19	K/504/6859	Establish and coordinate a project team in planning and conservation	4	6
20	D/504/6860	Manage project risks and impacts in planning, conservation and building control	5	6
21	H/504/6861	Identify survey and information requirements in planning, conservation and building control	3	5
22	K/504/6862	Plan, analyse and present test results in conservation	3	6
23	M/504/6863	Analyse and present measured survey information in conservation and building control	5	5
24	T/504/6864	Organise an investigation in conservation and building control	3	4
25	F/504/6866	Select, test and refine project solutions in planning and conservation	6	6
26	J/504/6867	Prepare technical specifications and schedules in conservation	3	6
27	L/504/6868	Prepare, present and advise on project recommendations in conservation	4	6
28	H/504/6911	Evaluate and advise on energy factors in conservation	6	6
29	J/504/6870 *Mandatory in Culture	Analyse research and report on historic and heritage assets in conservation	6	6



ABBE is a wholly owned subsidiary of Birmingham City University

30	R/504/6872	Prepare applications to secure statutory consents in planning and conservation	5	6
31	Y/504/6873	Prepare graphical information in conservation and building control	3	5
32	D/504/6874	Implement resource efficient procurement processes in conservation	6	6
33	K/504/6876	Manage project completion and handover guidance in conservation	5	6
34	M/504/6877	Evaluate and resolve disputes in planning, conservation and building control	6	6
35	T/504/6878	Prepare and present evidence on disputes in planning, conservation and building control	6	6
36	A/504/6879 **Mandatory in Condition	Survey, assess and record the condition of assets in conservation	6	6
37	M/504/6880	Monitor and control property and asset(s) use in conservation	5	6
38	A/504/6882	Establish, implement and maintain administrative services in conservation and building control	4	5
39	F/504/6883	Define, implement and manage information systems in planning, conservation and building control	3	5
40	J/504/6884	Develop and maintain working relationships in planning, conservation and building control	3	5

## 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.

## 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.



ABBE is a wholly owned subsidiary of Birmingham City University

### 3. Qualification Unit(s)\*

#### Pathway 1 Culture – Mandatory Units

##### Unit 1CUL: Identify and assess significant factors influencing project proposals in conservation and building control

Unit Reference Number: A/504/6865

Level: 6

Credit: 4

#### Unit Summary

In this unit you will need to be able to research factors which may influence the project development. You will also need to be able to select potential solutions that meet the requirements of the project brief and advise the client on the most appropriate courses of action.

#### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and assess significant factors influencing project proposals in conservation and building control	1.1 Obtain information, options and proposal parameters which are relevant to the development of the project brief
	1.2 Analyse the findings of investigations and identify significant factors which may influence existing and anticipated development
	1.3 Format and collate data and conclusions from all areas of specialist research and project evaluation, and circulate the documents to project team members
	1.4 Analyse the information available with the project team, and produce realistic proposal parameters which recognise significant opportunities and constraints
	1.5 Agree recommendations with the project team
	1.6 Assess the proposal parameters, circulate the assessment to the people responsible for project development, planning and scheduling
	1.7 Select potential solutions for further development by the project team which appear to meet the requirements of the project brief and which resolve a significant number of constraints on development
	1.8 Advise the client on the most appropriate courses of action where relevant
2. Understand how to identify and assess significant factors influencing project proposals in conservation and building control	2.1 Explain how to obtain information, options and proposal parameters which are relevant to the development of the project brief
	2.2 Explain how to format and collate data and conclusions and circulate documents to project team members
	2.3 Examine how to analyse the findings of investigations
	2.4 Describe how to identify significant factors which may influence existing and anticipated development



ABBE is a wholly owned subsidiary of Birmingham City University

	2.5 Examine how to assess the proposal parameters
	2.6 Explain how to circulate the assessment of the proposal parameters to people who are responsible for project development, planning and scheduling
	2.7 Explain how to produce realistic proposal parameters which recognise significant opportunities and constraints
	2.8 Examine how to analyse the information available
	2.9 Propose how to advise the client on the most appropriate courses of action
	2.10 Evaluate how to select project solutions for further development by the project team
	2.11 Evaluate how to agree recommendations with the project team

**\*\*This unit is mandatory in Culture, but is optional in Condition Pathway**



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 2CUL: Analyse research and report on historic and heritage assets in conservation

Unit Reference Number: J/504/6870

Level: 6

Credit: 6

### Unit Summary

This unit is about undertaking research to establish the cultural significance (and any designations) of assets. You will need to collect, collate, analyse and evaluate investigation data. You will need to report on the relative historic and heritage value, interest, character and significance in order to understand their status, condition and behaviour over time. You will also need to record statements of interest, character and significance and lodge in appropriate archives.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to research information on historic and heritage assets	1.1 Identify the priorities and factors for investigation and research that may be significant to establishing the cultural significance (and any designations) of assets
	1.2 Identify investigation sources and collect and collate relevant data
	1.3 Analyse and evaluate the investigation data which has been collected about all of the significant factors affecting the assets
	1.4 Identify complex issues and obtain specialist advice by providing an accurate summary of the problems
	1.5 Incorporate this specialist advice, and resolve conflicts where necessary
	1.6 Identify and accurately record aspects of the assets in relation to the purpose of the research
2. Understand how to research information on historic and heritage assets	2.1 Describe what to identify as the priorities and factors for investigation and research that may be significant to establishing the cultural significance (and any designations) of assets
	2.2 Describe what to identify as investigation sources and the collection and collation of relevant data
	2.3 Examine how to analyse the investigation data which has been collected about all of the significant factors affecting the assets
	2.4 Evaluate the investigation data which has been collected about all of the significant factors affecting the assets
	2.5 Describe what to identify as complex issues
	2.6 Explain how to obtain specialist advice
	2.7 Explain how to incorporate specialist advice, and resolve conflicts where necessary
	2.8 Describe how to identify aspects of the assets in relation to the purpose of the research



ABBE is a wholly owned subsidiary of Birmingham City University

	2.9 Explain how to accurately record aspects of the assets in relation to the purpose of the research
3. Be able to analyse and report on the significance of historic and heritage assets	3.1 Collate, review and interpret the results of investigations and research in order to gain an overview of the potential views on the cultural and heritage value of assets
	3.2 Analyse information sources relating to assets and identify their relative cultural and heritage value, their interest, character and significance in order to understand their status, condition and behaviour over time
	3.3 Consult with experts on specific issues which are relevant to the assessment and which are beyond personal experience by providing them with an accurate summary of the problems
	3.4 Record statements of cultural interest, character and significance
	3.5 Archive records which are clear, accurate and complete and conform to accepted professional and statutory requirements
4. Understand how to analyse and report on the significance of historic and heritage assets	4.1 Explain how to collate the results of investigations and research in order to gain an overview of the potential views on the cultural and heritage value of assets
	4.2 Examine how to review and interpret the results of investigations and research in order to gain an overview of the potential views on the cultural and heritage value of assets
	4.3 Examine how to analyse information sources relating to assets
	4.4 Describe what to identify as the relative historic and heritage value, interest, character and significance of assets in order to understand their status, condition and behaviour over time
	4.5 Explain how to consult with experts on specific issues which are relevant to the assessment and which are beyond personal experience by providing them with an accurate summary of the problems
	4.6 Explain how to record statements of interest, character and significance and lodge in an appropriate archive
	4.7 Explain how to archive records which are clear, accurate and conform to accepted professional and statutory requirements



## Unit 3CUL: Develop and advise on conservation, repair and maintenance strategies and solutions

Unit Reference Number: L/504/6871

Level: 6

Credit: 8

### Unit Summary

This unit is about agreeing with stakeholders and experts suitable strategies for the conservation, repair and maintenance of assets. You will need to identify status and condition and any threats to the significance of assets. You will need to work with stakeholders and experts to consider options and establish briefs from conservation, repair and maintenance strategies. It is about agreeing with stakeholders an overall strategy for conservation, repair and maintenance of assets that meet the legislative and policy frameworks for protection and preservation and allow the project to progress to the next stage.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and develop conservation, repair and maintenance options and strategies	1.1 Identify status and condition and any immediate and potential threats to the significance of assets, and determine how they may be vulnerable
	1.2 Identify relevant factors which are likely to influence existing and anticipated conservation, repair and maintenance options, and assess their relevance and priority
	1.3 Assess whether the conservation, repair and maintenance strategies can meet both the relevant factors and the legislative and policy frameworks for protection and preservation
	1.4 Work with relevant stakeholders and experts to consider options until key conflicts are resolved
	1.5 Develop conservation, repair and maintenance strategies appropriate to local needs, abilities and resources
	1.6 Develop and establish briefs from conservation, repair and maintenance strategies in negotiation with stakeholders
2. Understand how to identify and develop conservation, repair and maintenance options and strategies	2.1 Describe what to identify as immediate and potential threats to the significance of assets
	2.2 Evaluate how to determine how the significance of assets may be vulnerable
	2.3 Describe what to identify as relevant factors which are likely to influence existing and anticipated conservation, repair and maintenance options, and assess their relevance and priority
	2.4 Examine how to assess whether the conservation, repair and maintenance strategies can meet both the relevant factors and the legislative and policy frameworks for protection and preservation
	2.5 Explain how to work with relevant stakeholders and experts to consider options until key conflicts are resolved
	2.6 Propose how to develop conservation, repair and maintenance strategies appropriate to local needs, abilities and resources



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Propose how to develop and establish briefs from conservation, repair and maintenance strategies in negotiation with stakeholders
3. Be able to advise on and refine integrated conservation,	3.1 Obtain information relevant to the conservation, repair and maintenance briefs and identify the relevant solutions
	3.2 identify factors which are likely to influence solutions, assess their relevance and prioritise them
	3.3 Assess whether the overall conservation, repair and maintenance strategy can meet both the technical and functional constraints of the brief within the legislative and policy frameworks for protection and preservation
	3.4 Obtain alternative sources of information and solutions, where existing approaches do not meet the parameters of the brief, which have the potential to offer alternative approaches
	3.5 Discuss the proposed options with stakeholders, and assess and incorporate their observations
	3.6 Assess the potential impact of modern technology and repair methods on factors relating to assets
	3.7 Advise on situations where incompatibility of the use of materials can be detrimental to the future of the asset
	3.8 Provide clients/owners with enough relevant and accurate information at the right time to agree a detailed solution
	3.9 Recommend, justify and agree conservation, repair and maintenance solutions which are acceptable to the stakeholders, which meet the legislative and policy frameworks for protection and preservation and allow the project to progress to the next stage
4. Understand how to advise on and refine integrated conservation, repair and maintenance solutions	4.1 Explain how to obtain information relevant to the conservation, repair and maintenance briefs
	4.2 Describe what to identify as the relevant solutions
	4.3 Describe what to identify as factors which are likely to influence solutions
	4.4 Examine how to assess factors for their relevance and prioritise them
	4.5 Examine how to assess whether the overall conservation, repair and maintenance strategy can meet both the technical and functional constraints of the brief within the legislative and policy frameworks for protection and preservation
	4.6 Explain how to obtain alternative sources of information and solutions, where existing approaches do not meet the parameters of the brief, which have the potential to offer alternative approaches
	4.7 Explain how to discuss the proposed options with stakeholders, and assess and incorporate their observations
	4.8 Examine how to assess the potential impact of modern technology and repair methods on factors relating to assets
	4.9 Propose how to advise on situations where the incompatibility of the use of materials can be detrimental to the future of the asset
	4.10 Explain how to provide clients/owners with enough relevant and accurate information at the right time to agree a detailed solution
	4.11 Propose how to recommend conservation, repair and maintenance solutions which are acceptable to the stakeholders, which meet the legislative and policy frameworks for protection



	and preservation and allow the project to progress to the next stage
	4.12 Evaluate how to justify and agree conservation, repair and maintenance solutions which are acceptable to the stakeholders, which meet the legislative and policy frameworks for protection and preservation and allow the project to progress to the next stage



## Unit 4CUL: Manage quality and cost variations in conservation projects

Unit Reference Number: H/504/6875

Level: 6

Credit: 6

### Unit Summary

This unit is about developing and implementing systems to monitor and record contract quality and progress in line with project cost control systems. You will need to select work methods that make the best use of available resources and which meets other essential criteria. You will need to check conforms to design requirements and specified quality standards and guidance. In instances where work does not comply with legal and statutory requirements you will need to take appropriate corrective action. You will need to be able to collect, calculate and prepare cost data. You will also need to identify and investigate any variations in cost data and implement appropriate corrective action.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to manage projects against agreed quality standards	1.1 Identify and interpret objectives and approach and quality standards and guidance from available information and pass them to people responsible for their implementation, before they start work
	1.2 Specify, clearly and unambiguously, the responsibilities with people responsible for maintaining quality standards and guidance
	1.3 Set up monitoring systems for inspecting and controlling the quality of work and record the outcomes
	1.4 Check, regularly, that work conforms to the design requirements and the specified quality standards and guidance
	1.5 Identify work which fails to meet the requirements and specified quality standards and guidance and implement corrective action
	1.6 Ask for unacceptable quality standards and guidance to be corrected and notify decision makers if this is not done within a reasonable time
	1.7 Inform decision makers regularly about significant variations in quality standards and guidance , programme and safety implications, and suggest the decisions which they need to make and actions they need to take
	1.8 Identify situations which do not comply with legal and statutory requirements, investigate the circumstances thoroughly and take appropriate corrective action
	1.9 Identify improvements from feedback received and recommend them to decision makers
	1.10 Agree amendments to the contract quality standards and guidance and record them accurately
2. Understand how to manage projects against agreed quality standards	2.1 Describe what to identify as the objectives and approach and quality standards and guidance
	2.2 Examine how to investigate the circumstances of situations that do not comply with legal and statutory requirements



ABBE is a wholly owned subsidiary of Birmingham City University

	2.3 Explain how to ask for unacceptable quality standards and guidance to be corrected and notify decision makers if they are not corrected within a reasonable time
	2.4 Explain how to inform decision makers about significant variations in quality standards and guidance, programme and safety implications
	2.5 Describe what to identify as situations which do not comply with legal and statutory requirements
	2.6 Explain how to record amendments to the contract quality standards and guidelines
	2.7 Propose how to suggest the decisions which decision makers need to make about significant variations in quality standards and guidance and actions they need to take
	2.8 Evaluate how to specify the responsibilities with people responsible for maintaining quality standards and guidance
	2.9 Evaluate how to agree amendments to the contract quality standards and guidance
	2.10 Examine how to interpret objectives and approach and quality standards and guidance
	2.11 Explain how to pass objectives and approach, quality standards and guidance on to people responsible for implementing them before they start work
	2.12 Describe what to identify as improvements from feedback received
	2.13 Propose how to recommend improvements to decision makers
	2.14 Evaluate how to specify the responsibilities which individuals have for maintaining quality standards and guidance
	2.15 Describe what to identify as work which fails to meet the requirements and specified quality standards and guidance
	2.16 Explain how to check that work conforms to the design requirements and the specified quality standard and guidance
	2.17 Explain how to implement corrective action where work fails to meet the requirements and specified quality standards and guidance
	2.18 Propose how to set up systems for inspecting and controlling the quality of work and recording the outcomes
	2.19 Explain how to take corrective action in cases of non-compliance with legal and statutory requirements
3. Be able to manage project and costs	3.1 Develop and implement appropriate project cost control systems which are able to provide early warning of problems
	3.2 Collect cost data regularly, record it correctly and pass it on to the people who need it in time for them to be able to use it
	3.3 Calculate the correct work values and cost data from estimates of work quantity and payment rates
	3.4 Prepare accurate cost data and present it in a format which will help people to make decisions
	3.5 Identify variations and trends in cost data and quantify and cost them
	3.6 Investigate any variations thoroughly and agree and implement appropriate action with decision makers which will restore costs and expenditure to budget
	3.7 Develop and implement systems and processes for identifying contract variations in costs and recommend them to decision makers
	4.1 Explain how to implement appropriate project cost control systems which are able to provide early warning of problems



4. Understand how to manage project and costs	4.2 Propose how to develop appropriate project cost control systems which are able to provide early warning of problem
	4.3 Describe what to identify as variations and trends in cost data
	4.4 Explain how to collect and record cost data and pass on the data to the people who need it
	4.5 Explain how to calculate the correct work values and cost data from estimates of work quantity and payment rates
	4.6 Explain how to prepare and present accurate cost variations and trends in cost data in a format which will help people to make decision
	4.7 Examine how to quantify and cost variations in cost trends in
	4.8 Examine how to investigate any variations
	4.9 Explain how to implement appropriate action with decision makers which will restore costs and expenditure to budget
	4.10 Evaluate how to agree appropriate action with decision makers which will restore costs and expenditure to budget
	4.11 Explain how to implement systems and processes for identifying contract variations in costs
	4.12 Propose how to develop and recommend to decision makers systems and processes for identifying contract variations in costs



## Unit 5CUL: Provide ethical advice, judgement and service in planning, conservation and building control

Unit Reference Number: D/504/6888

Level: 6

Credit: 7

### Unit Summary

This unit concerns the giving of information and advice to a variety of people, including work colleagues and the public. It requires a familiarity with the roles, responsibilities and potential of all bodies and individuals within public, private and voluntary sectors that have a significant planning, conservation and/or building control role. It also requires the ability to establish and maintain good contacts in order to seek specialist advice both within and outside your profession, to use information appropriately and to negotiate effectively with community and amenity groups, elected representatives, clients, applicants and officials.

It also concerns the way in which you conduct your work activities – the way you make decisions, stay within the agreed standards, and develop your own skills and know-how. You will need to be able to provide accurate information and advice in a way that is fit for purpose. You will need to be able to identify and weigh all the factors and reach a satisfactory decision. You will need to carry out your work in line with accepted standards and good practice. You will also need to take personal responsibility for your actions.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to exchange information and provide advice	1.1 Obtain information which is sufficiently detailed for the purposes for which it is to be used
	1.2 Provide information and advice which is complete, summarised accurately and is clearly relevant to the purpose
	1.3 Identify and explain the benefits and implications of adopting the information and advice provided
	1.4 Present information and advice using a style of communication which is appropriate to the ability, knowledge, understanding and disposition of the people receiving information and advice
2. Understand how to exchange information and provide advice	2.1 Explain how to obtain information which is sufficiently detailed for the purposes for which it is to be used
	2.2 Explain how to provide information and advice
	2.3 Describe how to identify and explain the benefits and implications of adopting the information and advice provided
	2.4 Explain how to present information and advice in a style appropriate to the people receiving information and advice
3. Be able to evaluate complex issues and generate solutions	3.1 Identify where complex issues exist, estimate their effects realistically and summarise the problems for the people who are affected and concerned
	3.2 Assess the accuracy and completeness of the information available and identify any significant gaps
	3.3 Obtain enough additional information to cover any gaps to enable analysis



ABBE is a wholly owned subsidiary of Birmingham City University

	3.4 Request appropriate tests to collect information which cannot be obtained directly
	3.5 Consult with specialists from different technical disciplines by providing them with clear and accurate information
	3.6 Analyse and interpret the information and draw justifiable conclusions
	3.7 Use experience and clear criteria to apply solutions following careful analysis of all factors
	3.8 Record preferred solutions
4. Understand how to evaluate	4.1 Describe what to identify as any significant gaps in the information available
	4.2 Explain how to obtain enough additional information to cover any gaps to enable analysis
	4.3 Explain how to consult with specialists from different technical disciplines
	4.4 Examine how to assess the accuracy and completeness of the information
	4.5 How to request appropriate tests to collect information which cannot be obtained directly
	4.6 Examine how to analyse and interpret the information and draw justifiable conclusions
	4.7 Describe how to identify where complex issues exist
	4.8 Explain how to use experience and criteria to apply solutions
	4.9 Explain how to summarise problems for the people who are affected and concerned
	4.10 Examine how to estimate the effects of complex issues
	4.11 Explain how to record preferred solutions
5. Be able to operate in an ethical manner	5.1 Make judgements and offer advice which balances the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
	5.2 Take clear and unequivocal personal responsibility for personal decisions
	5.3 Disclose information only to those who have a legitimate right to receive it
	5.4 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust
	5.5 Define and agree the working practices and the expectations of the people involved in contracts
	5.6 Enter into formal and informal contracts and agreements for advisory and problem- solving services which conform to legal requirements, ethical standards and recognised good practice
	5.7 Refuse offers and contracts which are illegal and which may generate conflicts of interest
	5.8 Ensure systems protect individual and community interests and to compensate stakeholders where the advice given results in loss or damage to the stakeholder are in place
6. Understand how to operate in an ethical manner	6.1 Propose how to offer advice which balances the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
	6.2 Evaluate how to make judgements which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected



	6.3 Evaluate how to take personal responsibility for personal decisions
	6.4 Explain how to disclose information only to those who have a legitimate right to receive it
	6.5 Explain how to communicate with stakeholders in order to maintain professional independence and maximise goodwill and trust
	6.6 Evaluate how to define and agree the working practices and the expectations of the people involved in contracts
	6.7 Evaluate how to enter into formal and informal contracts and agreements for advisory and problem-solving services which conform to legal requirements, ethical standards and recognised good practice
	6.8 Evaluate how to refuse offers and contracts which are illegal and which may generate conflicts of interest
	6.9 Explain how to ensure that systems are set up to protect individual and community interests and to compensate stakeholders where the advice given results in loss or damage to the stakeholder



## Unit 6CUL: Advance and develop occupational knowledge and practice in planning, conservation and building control

Unit Reference Number: H/504/6889

Level: 6

Credit: 6

### Unit Summary

This unit concerns the need for all individuals to carry out their own continuing development to keep abreast in changes in technology, legislation, materials and practices. It is also concerned with the advice and support offered to others to assist them in their development. You will also need to have a clear view of your development needs, and undertake learning activities over a sustained timescale to address any weaknesses or exploit any strengths. You will need to assist others in planning their personal development, taking into consideration available resources. You will also need to provide feedback to others in relation to objectives that have been set.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to develop others using your experience	1.1 Identify, through discussion with people, areas where they need help to achieve their agreed competence levels and use the information to produce an agreed personal development plan
	1.2 Identify and offer adequate and appropriate opportunities and resources for people to learn
	1.3 Select and summarise relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials
	1.4 Advise and coach people so that they can identify their current level of competence, their learning needs and targets
	1.5 Select and use appropriate learning activities which are suitable for the topic and the needs of individuals
	1.6 Present information to others which is appropriate to their needs
	1.7 Encourage people to ask questions, seek clarification and advice when they need help and during learning activities
	1.8 Review people's progress towards agreed objectives and give realistic and positive feedback on their achievements
2. Understand how to develop others using your experience	2.1 Describe what to identify as areas in which people need help to achieve agreed competence levels
	2.2 Explain how to use information about peoples' needs to produce an agreed personal development plan
	2.3 Explain how to offer adequate and appropriate opportunities and resources for people to learn
	2.4 Describe what to identify as adequate and appropriate opportunities and resources for people to learn
	2.5 Explain how to summarise relevant and up to date information about knowledge and practice
	2.6 Evaluate how to select relevant and up to date information about knowledge and practice
	2.7 Propose how to advise and coach people so that they can identify their current level of competence, their learning needs and targets
	2.8 Explain how to use appropriate learning activities



ABBE is a wholly owned subsidiary of Birmingham City University

	2.9 Evaluate how to select appropriate learning activities
	2.10 Explain how to present information to others
	2.11 Explain how to encourage people to ask questions, to seek clarification and advice when they need help and during learning activities
	2.12 Explain how to give realistic and positive feedback on achievements
	2.13 Examine how to review peoples' progress towards agreed objectives
3. Be able to undertake continued personal development	3.1 Define personal objectives for achieving personal development aims
	3.2 Identify and contact sources of support and guidance for undertaking personal development
	3.3 Identify and select relevant standards of competence against which personal development can be measured
	3.4 Analyse the current personal level of performance against the identified standards of competence and record a profile of present competence and personal development needs
	3.5 Prepare a development plan for achieving identified development objectives
	3.6 Undertake development activities aimed at achieving identified development needs, review and record progress and the effectiveness of the activities
	3.7 Measure achievement of identified development needs and record evidence of competence gained against the identified standards of competence
	3.8 Review the cycle of personal objectives and personal development aims and revise and update them to suit changing circumstances
4. Understand how to undertake continued personal development	4.1 Evaluate how to define the personal objectives for achieving personal development aims
	4.2 Describe what to identify as sources of support and guidance for undertaking personal development
	4.3 Explain how to contact sources of support and guidance for undertaking personal development
	4.4 Describe what to identify as relevant standards of competence against which personal development can be measured
	4.5 Explain how to record a profile of present competence and personal development needs
	4.6 Explain how to measure achievement of identified development needs and record evidence of competence gained against the identified standards of competence
	4.7 Examine how to analyse the current personal level of performance against the identified standards of competence
	4.8 Evaluate how to select relevant standards of competence against which personal development can be measured
	4.9 Explain how to prepare a development plan
	4.10 Explain how to record progress and the effectiveness of the development activities
	4.11 Examine how to review progress and the effectiveness of the development activities
	4.12 Evaluate how to undertake development activities
	4.13 Explain how to revise and update personal objectives for achieving personal development aims to suit changing circumstances
	4.14 Examine how to review the cycle of personal development aims and objectives



ABBE is a wholly owned subsidiary of Birmingham City University

## Pathway 2 Condition – Mandatory Units

### Unit 1CON: Identify and assess significant factors influencing project proposals in conservation and building control

Unit Reference Number: A/504/6865

Level: 6

Credit: 4

#### Unit Summary

In this unit you will need to be able to research factors which may influence the project development. You will also need to be able to select potential solutions that meet the requirements of the project brief and advise the client on the most appropriate courses of action.

#### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and assess significant factors influencing project proposals in conservation and building control	1.1 Obtain information, options and proposal parameters which are relevant to the development of the project brief
	1.2 Analyse the findings of investigations and identify significant factors which may influence existing and anticipated development
	1.3 Format and collate data and conclusions from all areas of specialist research and project evaluation, and circulate the documents to project team members
	1.4 Analyse the information available with the project team, and produce realistic proposal parameters which recognise significant opportunities and constraints
	1.5 Agree recommendations with the project team
	1.6 Assess the proposal parameters, circulate the assessment to the people responsible for project development, planning and scheduling
	1.7 Select potential solutions for further development by the project team which appear to meet the requirements of the project brief and which resolve a significant number of constraints on development
	1.8 Advise the client on the most appropriate courses of action where relevant
2. Understand how to identify and assess significant factors influencing project proposals in conservation and building control	2.1 Explain how to obtain information, options and proposal parameters which are relevant to the development of the project brief
	2.2 Explain how to format and collate data and conclusions and circulate documents to project team members
	2.3 Examine how to analyse the findings of investigations
	2.4 Describe how to identify significant factors which may influence existing and anticipated development
	2.5 Examine how to assess the proposal parameters



ABBE is a wholly owned subsidiary of Birmingham City University

	2.6 Explain how to circulate the assessment of the proposal parameters to people who are responsible for project development, planning and scheduling
	2.7 Explain how to produce realistic proposal parameters which recognise significant opportunities and constraints
	2.8 Examine how to analyse the information available
	2.9 Propose how to advise the client on the most appropriate courses of action
	2.10 Evaluate how to select project solutions for further development by the project team
	2.11 Evaluate how to agree recommendations with the project team



## Unit 2CON: Develop and advise on conservation, repair, maintenance strategies and solutions

Unit Reference Number: L/504/6871

Level: 6

Credit: 8

### Unit Summary

This unit is about agreeing with stakeholders and experts suitable strategies for the conservation, repair and maintenance of assets. You will need to identify status and condition and any threats to the significance of assets. You will need to work with stakeholders and experts to consider options and establish briefs from conservation, repair and maintenance strategies. It is about agreeing with stakeholders an overall strategy for conservation, repair and maintenance of assets that meet the legislative and policy frameworks for protection and preservation and allow the project to progress to the next stage.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and develop conservation, repair and maintenance options and strategies	1.1 Identify status and condition and any immediate and potential threats to the significance of assets, and determine how they may be vulnerable
	1.2 Identify relevant factors which are likely to influence existing and anticipated conservation, repair and maintenance options, and assess their relevance and priority
	1.3 Assess whether the conservation, repair and maintenance strategies can meet both the relevant factors and the legislative and policy frameworks for protection and preservation
	1.4 Work with relevant stakeholders and experts to consider options until key conflicts are resolved
	1.5 Develop conservation, repair and maintenance strategies appropriate to local needs, abilities and resources
	1.6 Develop and establish briefs from conservation, repair and maintenance strategies in negotiation with stakeholders
2. Understand how to identify and develop conservation, repair and maintenance options and strategies	2.1 Describe what to identify as immediate and potential threats to the significance of assets
	2.2 Evaluate how to determine how the significance of assets may be vulnerable
	2.3 Describe what to identify as relevant factors which are likely to influence existing and anticipated conservation, repair and maintenance options, and assess their relevance and priority
	2.4 Examine how to assess whether the conservation, repair and maintenance strategies can meet both the relevant factors and the legislative and policy frameworks for protection and preservation
	2.5 Explain how to work with relevant stakeholders and experts to consider options until key conflicts are resolved
	2.6 Propose how to develop conservation, repair and maintenance strategies appropriate to local needs, abilities and resources



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Propose how to develop and establish briefs from conservation, repair and maintenance strategies in negotiation with stakeholders
3. Be able to advise on and refine integrated conservation,	3.1 Obtain information relevant to the conservation, repair and maintenance briefs and identify the relevant solutions
	3.2 identify factors which are likely to influence solutions, assess their relevance and prioritise them
	3.3 Assess whether the overall conservation, repair and maintenance strategy can meet both the technical and functional constraints of the brief within the legislative and policy frameworks for protection and preservation
	3.4 Obtain alternative sources of information and solutions, where existing approaches do not meet the parameters of the brief, which have the potential to offer alternative approaches
	3.5 Discuss the proposed options with stakeholders, and assess and incorporate their observations
	3.6 Assess the potential impact of modern technology and repair methods on factors relating to assets
	3.7 Advise on situations where incompatibility of the use of materials can be detrimental to the future of the asset
	3.8 Provide clients/owners with enough relevant and accurate information at the right time to agree a detailed solution
	3.9 Recommend, justify and agree conservation, repair and maintenance solutions which are acceptable to the stakeholders, which meet the legislative and policy frameworks for protection and preservation and allow the project to progress to the next stage
4. Understand how to advise on and refine integrated conservation, repair and maintenance solutions	4.1 Explain how to obtain information relevant to the conservation, repair and maintenance briefs
	4.2 Describe what to identify as the relevant solutions
	4.3 Describe what to identify as factors which are likely to influence solutions
	4.4 Examine how to assess factors for their relevance and prioritise them
	4.5 Examine how to assess whether the overall conservation, repair and maintenance strategy can meet both the technical and functional constraints of the brief within the legislative and policy frameworks for protection and preservation
	4.6 Explain how to obtain alternative sources of information and solutions, where existing approaches do not meet the parameters of the brief, which have the potential to offer alternative approaches
	4.7 Explain how to discuss the proposed options with stakeholders, and assess and incorporate their observations
	4.8 Examine how to assess the potential impact of modern technology and repair methods on factors relating to assets
	4.9 Propose how to advise on situations where the incompatibility of the use of materials can be detrimental to the future of the asset
	4.10 Explain how to provide clients/owners with enough relevant and accurate information at the right time to agree a detailed solution
	4.11 Propose how to recommend conservation, repair and maintenance solutions which are acceptable to the stakeholders, which meet the legislative and policy frameworks for protection



ABBE is a wholly owned subsidiary of Birmingham City University

	and preservation and allow the project to progress to the next stage
	4.12 Evaluate how to justify and agree conservation, repair and maintenance solutions which are acceptable to the stakeholders, which meet the legislative and policy frameworks for protection and preservation and allow the project to progress to the next stage



## Unit 3CON: Manage quality and cost variations in conservation projects

Unit Reference Number: H/504/6875

Level: 6

Credit: 6

### Unit Summary

This unit is about developing and implementing systems to monitor and record contract quality and progress in line with project cost control systems. You will need to select work methods that make the best use of available resources and which meets other essential criteria. You will need to check conforms to design requirements and specified quality standards and guidance. In instances where work does not comply with legal and statutory requirements you will need to take appropriate corrective action. You will need to be able to collect, calculate and prepare cost data. You will also need to identify and investigate any variations in cost data and implement appropriate corrective action.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to manage projects against agreed quality standards	1.1 Identify and interpret objectives and approach and quality standards and guidance from available information and pass them to people responsible for their implementation, before they start work
	1.2 Specify, clearly and unambiguously, the responsibilities with people responsible for maintaining quality standards and guidance
	1.3 Set up monitoring systems for inspecting and controlling the quality of work and record the outcomes
	1.4 Check, regularly, that work conforms to the design requirements and the specified quality standards and guidance
	1.5 Identify work which fails to meet the requirements and specified quality standards and guidance and implement corrective action
	1.6 Ask for unacceptable quality standards and guidance to be corrected and notify decision makers if this is not done within a reasonable time
	1.7 Inform decision makers regularly about significant variations in quality standards and guidance , programme and safety implications, and suggest the decisions which they need to make and actions they need to take
	1.8 Identify situations which do not comply with legal and statutory requirements, investigate the circumstances thoroughly and take appropriate corrective action
	1.9 Identify improvements from feedback received and recommend them to decision makers
	1.10 Agree amendments to the contract quality standards and guidance and record them accurately
2. Understand how to manage projects against agreed quality standards	2.1 Describe what to identify as the objectives and approach and quality standards and guidance
	2.2 Examine how to investigate the circumstances of situations that do not comply with legal and statutory requirements



ABBE is a wholly owned subsidiary of Birmingham City University

	2.3 Explain how to ask for unacceptable quality standards and guidance to be corrected and notify decision makers if they are not corrected within a reasonable time
	2.4 Explain how to inform decision makers about significant variations in quality standards and guidance, programme and safety implications
	2.5 Describe what to identify as situations which do not comply with legal and statutory requirements
	2.6 Explain how to record amendments to the contract quality standards and guidelines
	2.7 Propose how to suggest the decisions which decision makers need to make about significant variations in quality standards and guidance and actions they need to take
	2.8 Evaluate how to specify the responsibilities with people responsible for maintaining quality standards and guidance
	2.9 Evaluate how to agree amendments to the contract quality standards and guidance
	2.10 Examine how to interpret objectives and approach and quality standards and guidance
	2.11 Explain how to pass objectives and approach, quality standards and guidance on to people responsible for implementing them before they start work
	2.12 Describe what to identify as improvements from feedback received
	2.13 Propose how to recommend improvements to decision makers
	2.14 Evaluate how to specify the responsibilities which individuals have for maintaining quality standards and guidance
	2.15 Describe what to identify as work which fails to meet the requirements and specified quality standards and guidance
	2.16 Explain how to check that work conforms to the design requirements and the specified quality standard and guidance
	2.17 Explain how to implement corrective action where work fails to meet the requirements and specified quality standards and guidance
	2.18 Propose how to set up systems for inspecting and controlling the quality of work and recording the outcomes
	2.19 Explain how to take corrective action in cases of non-compliance with legal and statutory requirements
3. Be able to manage project and costs	3.1 Develop and implement appropriate project cost control systems which are able to provide early warning of problems
	3.2 Collect cost data regularly, record it correctly and pass it on to the people who need it in time for them to be able to use it
	3.3 Calculate the correct work values and cost data from estimates of work quantity and payment rates
	3.4 Prepare accurate cost data and present it in a format which will help people to make decisions
	3.5 Identify variations and trends in cost data and quantify and cost them
	3.6 Investigate any variations thoroughly and agree and implement appropriate action with decision makers which will restore costs and expenditure to budget
	3.7 Develop and implement systems and processes for identifying contract variations in costs and recommend them to decision makers



4. Understand how to manage project and costs	4.1 Explain how to implement appropriate project cost control systems which are able to provide early warning of problems
	4.2 Propose how to develop appropriate project cost control systems which are able to provide early warning of problem
	4.3 Describe what to identify as variations and trends in cost data
	4.4 Explain how to collect and record cost data and pass on the data to the people who need it
	4.5 Explain how to calculate the correct work values and cost data from estimates of work quantity and payment rates
	4.6 Explain how to prepare and present accurate cost variations and trends in cost data in a format which will help people to make decision
	4.7 Examine how to quantify and cost variations in cost trends in
	4.8 Examine how to investigate any variations
	4.9 Explain how to implement appropriate action with decision makers which will restore costs and expenditure to budget
	4.10 Evaluate how to agree appropriate action with decision makers which will restore costs and expenditure to budget
	4.11 Explain how to implement systems and processes for identifying contract variations in costs
	4.12 Propose how to develop and recommend to decision makers systems and processes for identifying contract variations in costs



**\*This unit is mandatory in Condition, but is optional in the Culture Pathway**

**Unit 4CON: Survey, assess and record the condition of assets in conservation**

Unit Reference Number: A/504/6879

Level: 6

Credit: 6

**Unit Summary**

This unit concerns the surveying the condition of heritage asset(s). It covers the preparation phase, the completion of the survey and recording the results. You will need to recommend the appropriate way of carrying out the condition survey and agree it with interested parties. This involves evaluating existing information and identifying significant factors and selecting appropriate methods and techniques. You will need to observe, measure and record aspects of the asset(s) in relation to actual and potential causes of failure and decay. This will enable you to assess the condition of the asset(s). You will need to be able to summarise the findings of a property condition survey and make recommendations based upon it. You will need to answer clients' questions and provide clarification.

**Assessment Guidance**

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to agree asset condition	1.1 Identify and confirm the asset which require to be inspected
	1.2 Identify the objectives, purpose and approach of the condition survey and collate available information and documents
	1.3 Ensure risk assessment is carried out to determine safe working practices
	1.4 Select valid, accurate and relevant information for the condition survey process
	1.5 Evaluate relevant existing information and advice and identify significant factors which may influence the condition survey approach
	1.6 Identify and confirm the levels and types of technical professional specialist support which will be needed and brief them with clear and accurate summaries of the relevant information available and the survey objectives and purpose
	1.7 Select methods and techniques for the chosen approach and condition survey which meet the requirements of relevant codes of practice and legislation
	1.8 Recommend a condition survey process which is justified by the evaluation, present it clearly and explain it to the stakeholders
	1.9 Assess the validity of technical and professional and specialist support included in the recommendation
	1.10 Agree and confirm the client's instructions, permissions and rights of access for the condition survey before work starts
2. Understand how to agree asset condition	2.1 Describe what to identify as the asset which requires to be inspected
	2.2 Describe what to identify as the objectives, purpose and approach of the condition survey



ABBE is a wholly owned subsidiary of Birmingham City University

	2.3 Explain how to ensure that risk assessment is carried out to determine safe working practices
	2.4 Explain how to collate available information and document
	2.5 Evaluate how to select valid, accurate and relevant information for the condition and/or survey process
	2.6 Evaluate relevant information and advice
	2.7 Describe what to identify as significant factors which may influence the condition and/or survey approach
	2.8 Explain how to confirm the levels and types of technical and professional and specialist support which will be needed
	2.9 Describe what to identify as the levels and types of technical and professional and specialist support which will be needed
	2.10 Explain how to brief technical and professional and specialist support with clear and accurate summaries of the information available and the survey objectives and purpose
	2.11 Evaluate how to select methods and techniques for the chosen approach and condition and/or survey
	2.12 Propose how to recommend a condition survey process
	2.13 Explain how to present and explain the condition survey process to the stakeholder
	2.14 Examine how to assess the validity of technical and professional and specialist support included in the recommendations
	2.15 Explain how to confirm the client's instructions, permissions and rights of access for the condition and/or survey before work starts
	2.16 Evaluate how to agree the instructions and agreements for the condition and/or survey before work starts
3. Be able to inspect assets for condition	3.1 Evaluate existing available data and permissions, confirm the objectives, purpose and approach of the inspection and obtain the equipment and resources and specialist advice that will be needed
	3.2 Manage risk assessment and safe working practices in relation to inspections
	3.3 Take accurate observations, records and measurements of aspects of the asset which are necessary for the inspection
	3.4 Examine actual and potential causes of failure deterioration and decay and assess conditions
	3.5 Identify gaps in information and obtain and evaluate additional data needed
	3.6 Make further investigations when observations are inconsistent with existing data and findings, and accurately identify the cause of inconsistencies
	3.7 State clearly the authority for assumptions and projections used in the report and indicate any instances where and why accurate inspection and measurement has not been possible
	3.8 Identify and obtain specialist advice where complex issues are found
	3.9 Record observations and measurements clearly, accurately and completely using agreed formats and conventions
4. Understand how to inspect assets for condition	4.1 Evaluate existing available data and permissions
	4.2 Explain how to confirm that the objectives, purpose and approach of the inspection
	4.3 Explain how to obtain the equipment and resources and specialist advice that will be needed



	4.4 Evaluate how to manage risk assessment and safe working practices in relation to inspections
	4.5 Explain how to take accurate observations and measurements of aspects of the asset which are necessary for the inspection
	4.6 Examine how to examine actual and potential causes of failure and deterioration and assess condition
	4.7 Evaluate how to evaluate additional data needed
	4.8 Explain how to obtain additional data needed
	4.9 Explain how to state clearly instances where and why accurate inspection and measurement has not been possible
	4.10 Describe what to identify as gaps in information
	4.11 Examine how to make further investigations when observations are inconsistent with existing data and expected findings
	4.12 Describe what to identify as specialist advice
	4.13 Describe what to identify as the cause of inconsistencies with existing data
	4.14 Explain how to obtain specialist advice where complex issues are found
	4.15 Explain how to record observations and measurements clearly, accurately and completely using agreed formats and conventions
5. Be able to prepare and submit asset survey reports and records	5.1 Assemble and collate information on the objectives, purpose and approach of the condition survey
	5.2 Analyse all relevant evidence and information using appropriate methods and techniques and make a realistic assessment of condition
	5.3 Analyse and identify the implications and consequences of the decay
	5.4 Prepare and submit a condition survey report which is accurate, contains all relevant information and describes aspects of the asset
	5.5 Present findings and conclusions in formats that are suitable for circulation and discussion by non-specialists
	5.6 Answer the client's questions about the condition survey and give appropriate clarification and justification
	5.7 Archive records which are clear, accurate and complete and conform to accepted professional and statutory requirements
6. Understand how to prepare and submit asset survey reports and records	6.1 Explain how to assemble and collate information on the objectives, purpose and approach of the from the condition survey
	6.2 Examine how to analyse all relevant evidence and information using appropriate methods and techniques
	6.3 Examine how to make a realistic assessment of condition
	6.4 Examine how to analyse the implications and consequences of the decay
	6.5 Describe what to identify as the implications and consequences of the decay
	6.6 Explain how to prepare and submit a condition survey report
	6.7 Explain how to present findings and conclusions in formats that are suitable for circulation and discussion by non-specialists
	6.8 Explain how to answer the clients question about the condition survey and give appropriate clarification



	6.9 Explain how to archive records which are clear, accurate and complete and conform to accepted professional and statutory requirements
--	---



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 5CON: Provide ethical advice, judgement and service in planning, conservation and building control

Unit Reference Number: D/504/6888

Level: 6

Credit: 7

### Unit Summary

This unit concerns the giving of information and advice to a variety of people, including work colleagues and the public. It requires a familiarity with the roles, responsibilities and potential of all bodies and individuals within public, private and voluntary sectors that have a significant planning, conservation and/or building control role. It also requires the ability to establish and maintain good contacts in order to seek specialist advice both within and outside your profession, to use information appropriately and to negotiate effectively with community and amenity groups, elected representatives, clients, applicants and officials.

It also concerns the way in which you conduct your work activities – the way you make decisions, stay within the agreed standards, and develop your own skills and know-how. You will need to be able to provide accurate information and advice in a way that is fit for purpose. You will need to be able to identify and weigh all the factors and reach a satisfactory decision. You will need to carry out your work in line with accepted standards and good practice. You will also need to take personal responsibility for your actions.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to exchange information and provide advice	1.1 Obtain information which is sufficiently detailed for the purposes for which it is to be used
	1.2 Provide information and advice which is complete, summarised accurately and is clearly relevant to the purpose
	1.3 Identify and explain the benefits and implications of adopting the information and advice provided
	1.4 Present information and advice using a style of communication which is appropriate to the ability, knowledge, understanding and disposition of the people receiving information and advice
2. Understand how to exchange information and provide advice	2.1 Explain how to obtain information which is sufficiently detailed for the purposes for which it is to be used
	2.2 Explain how to provide information and advice
	2.3 Describe how to identify and explain the benefits and implications of adopting the information and advice provided
	2.4 Explain how to present information and advice in a style appropriate to the people receiving information and advice
3. Be able to evaluate complex issues and generate solutions	3.1 Identify where complex issues exist, estimate their effects realistically and summarise the problems for the people who are affected and concerned
	3.2 Assess the accuracy and completeness of the information available and identify any significant gaps



ABBE is a wholly owned subsidiary of Birmingham City University

	3.3 Obtain enough additional information to cover any gaps to enable analysis
	3.4 Request appropriate tests to collect information which cannot be obtained directly
	3.5 Consult with specialists from different technical disciplines by providing them with clear and accurate information
	3.6 Analyse and interpret the information and draw justifiable conclusions
	3.7 Use experience and clear criteria to apply solutions following careful analysis of all factors
	3.8 Record preferred solutions
4. Understand how to evaluate	4.1 Describe what to identify as any significant gaps in the information available
	4.2 Explain how to obtain enough additional information to cover any gaps to enable analysis
	4.3 Explain how to consult with specialists from different technical disciplines
	4.4 Examine how to assess the accuracy and completeness of the information
	4.5 How to request appropriate tests to collect information which cannot be obtained directly
	4.6 Examine how to analyse and interpret the information and draw justifiable conclusions
	4.7 Describe how to identify where complex issues exist
	4.8 Explain how to use experience and criteria to apply solutions
	4.9 Explain how to summarise problems for the people who are affected and concerned
	4.10 Examine how to estimate the effects of complex issues
	4.11 Explain how to record preferred solutions
5. Be able to operate in an ethical manner	5.1 Make judgements and offer advice which balances the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
	5.2 Take clear and unequivocal personal responsibility for personal decisions
	5.3 Disclose information only to those who have a legitimate right to receive it
	5.4 Communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust
	5.5 Define and agree the working practices and the expectations of the people involved in contracts
	5.6 Enter into formal and informal contracts and agreements for advisory and problem- solving services which conform to legal requirements, ethical standards and recognised good practice
	5.7 Refuse offers and contracts which are illegal and which may generate conflicts of interest
	5.8 Ensure systems protect individual and community interests and to compensate stakeholders where the advice given results in loss or damage to the stakeholder are in place



6. Understand how to operate in an ethical manner	6.1 Propose how to offer advice which balances the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
	6.2 Evaluate how to make judgements which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
	6.3 Evaluate how to take personal responsibility for personal decisions
	6.4 Explain how to disclose information only to those who have a legitimate right to receive it
	6.5 Explain how to communicate with stakeholders in order to maintain professional independence and maximise goodwill and trust
	6.6 Evaluate how to define and agree the working practices and the expectations of the people involved in contracts
	6.7 Evaluate how to enter into formal and informal contracts and agreements for advisory and problem-solving services which conform to legal requirements, ethical standards and recognised good practice
	6.8 Evaluate how to refuse offers and contracts which are illegal and which may generate conflicts of interest
	6.9 Explain how to ensure that systems are set up to protect individual and community interests and to compensate stakeholders where the advice given results in loss or damage to the stakeholder



## Unit 6CON: Advance and develop occupational knowledge and practice in planning, conservation and building control

Unit Reference Number: H/504/6889

Level: 6

Credit: 6

### Unit Summary

This unit concerns the need for all individuals to carry out their own continuing development to keep abreast in changes in technology, legislation, materials and practices. It is also concerned with the advice and support offered to others to assist them in their development. You will also need to have a clear view of your development needs, and undertake learning activities over a sustained timescale to address any weaknesses or exploit any strengths. You will need to assist others in planning their personal development, taking into consideration available resources. You will also need to provide feedback to others in relation to objectives that have been set.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to develop others using your experience	1.1 Identify, through discussion with people, areas where they need help to achieve their agreed competence levels and use the information to produce an agreed personal development plan
	1.2 Identify and offer adequate and appropriate opportunities and resources for people to learn
	1.3 Select and summarise relevant and up to date information about knowledge and practice in a format which is suitable for distribution and for developing learning materials
	1.4 Advise and coach people so that they can identify their current level of competence, their learning needs and targets
	1.5 Select and use appropriate learning activities which are suitable for the topic and the needs of individuals
	1.6 Present information to others which is appropriate to their needs
	1.7 Encourage people to ask questions, seek clarification and advice when they need help and during learning activities
	1.8 Review people's progress towards agreed objectives and give realistic and positive feedback on their achievements
2. Understand how to develop others using your experience	2.1 Describe what to identify as areas in which people need help to achieve agreed competence levels
	2.2 Explain how to use information about peoples' needs to produce an agreed personal development plan
	2.3 Explain how to offer adequate and appropriate opportunities and resources for people to learn
	2.4 Describe what to identify as adequate and appropriate opportunities and resources for people to learn
	2.5 Explain how to summarise relevant and up to date information about knowledge and practice



ABBE is a wholly owned subsidiary of Birmingham City University

	2.6 Evaluate how to select relevant and up to date information about knowledge and practice
	2.7 Propose how to advise and coach people so that they can identify their current level of competence, their learning needs and targets
	2.8 Explain how to use appropriate learning activities
	2.9 Evaluate how to select appropriate learning activities
	2.10 Explain how to present information to others
	2.11 Explain how to encourage people to ask questions, to seek clarification and advice when they need help and during learning activities
	2.12 Explain how to give realistic and positive feedback on achievements
	2.13 Examine how to review peoples' progress towards agreed objectives
3. Be able to undertake continued personal development	3.1 Define personal objectives for achieving personal development aims
	3.2 Identify and contact sources of support and guidance for undertaking personal development
	3.3 Identify and select relevant standards of competence against which personal development can be measured
	3.4 Analyse the current personal level of performance against the identified standards of competence and record a profile of present competence and personal development needs
	3.5 Prepare a development plan for achieving identified development objectives
	3.6 Undertake development activities aimed at achieving identified development needs, review and record progress and the effectiveness of the activities
	3.7 Measure achievement of identified development needs and record evidence of competence gained against the identified standards of competence
	3.8 Review the cycle of personal objectives and personal development aims and revise and update them to suit changing circumstances
4. Understand how to undertake continued personal development	4.1 Evaluate how to define the personal objectives for achieving personal development aims
	4.2 Describe what to identify as sources of support and guidance for undertaking personal development
	4.3 Explain how to contact sources of support and guidance for undertaking personal development
	4.4 Describe what to identify as relevant standards of competence against which personal development can be measured
	4.5 Explain how to record a profile of present competence and personal development needs
	4.6 Explain how to measure achievement of identified development needs and record evidence of competence gained against the identified standards of competence
	4.7 Examine how to analyse the current personal level of performance against the identified standards of competence



	4.8 Evaluate how to select relevant standards of competence against which personal development can be measured
	4.9 Explain how to prepare a development plan
	4.10 Explain how to record progress and the effectiveness of the development activities
	4.11 Examine how to review progress and the effectiveness of the development activities
	4.12 Evaluate how to undertake development activities
	4.13 Explain how to revise and update personal objectives for achieving personal development aims to suit changing circumstances
	4.14 Examine how to review the cycle of personal development aims and objectives



## Optional Units unless otherwise stated

### Unit 7: Analyse changes in the environment in planning and conservation

Unit Reference Number: K/504/6831

Level: 6

Credit: 6

#### Unit Summary

In a Planning context this unit concerns the analysis of changes in different aspects of the environment as a basis for developing policy options and choosing the most appropriate one.

In a Conservation context this unit requires an appreciation of the social, cultural, political, aesthetic, economic, and environmental values that underpin conservation policy and practice, a full knowledge of currently prevailing national and international principles and philosophies of conservation including guidelines adopted by ICOMOS, BSI, and other recognised bodies. You will need to identify key environmental factors and analyse significant relationships and trends

#### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to analyse changes in the environment in planning and conservation	1.1 Clarify those aspects of the environment which are to be monitored and reviewed for changes
	1.2 Apply the selected techniques for data gathering and analysis
	1.3 Collect reliable data regularly, check it for accuracy and summarise it
	1.4 Evaluate data realistically and draw justifiable conclusions about changing and emerging trends in the environment
	1.5 Compare the positive and negative effects of existing policies, legislation and operations and identify those which are having a significant impact on the environment for priority attention
	1.6 Compare trends in the environment which have been identified against policies, legislation and operations which are both existing and anticipated
	1.7 Identify those trends which are likely to produce requirements for changes in policies, operations and legislation
	1.8 Present findings about aspects of the environment in a suitable format and justify them to decision makers
2. Understand how to analyse changes in the environment in planning and conservation	2.1 Explain how to clarify as those aspects of the environment which are to be monitored and reviewed for changes
	2.2 Explain how to apply the selected techniques for data gathering and analysis
	2.3 Explain how to collect, check and summarise data
	2.4 Evaluate data realistically and draw justifiable conclusions about changing and emerging trends in the environment



ABBE is a wholly owned subsidiary of Birmingham City University

	2.5 Propose how to compare those policies, legislation and operations which are having a significant impact on the environment
	2.6 Describe how to identify the positive and negative effects of existing policies, legislation and operations for priority attention
	2.7 Propose how to compare trends in the environment which have been identified against policies, legislation and operations which are both existing and anticipated
	2.8 Describe how to identify those trends which are likely to produce requirements for changes in policies, legislation and operations
	2.9 Explain how to present findings about aspects of the environment
	2.10 Evaluate how to justify findings about aspects of the environment to decision makers



## Unit 8: Identify and consult on strategy options in planning and conservation

Unit Reference Number: J/504/6836

Level: 6

Credit: 6

### Unit Summary

This unit is about identifying policy options and presenting the case to decision makers. You will need to organise and analyse information in relation to planning, conservation and development strategies. You will need to engage with decision makers and stakeholders. You will need to present the case for the policy to decision makers.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and consult on strategy options in planning and conservation	1.1 Identify valid alternative strategy options, relevant surveys and research which address the most significant priority issues
	1.2 Identify the stakeholders who are likely to be involved in and affected by the proposed strategy options
	1.3 Plan and set up methods of consultation which will produce the full range of valid opinion on the strategy options proposed
	1.4 Present the strategy options to people and groups who are interested and informed, and summarise their feedback
	1.5 Consult specialists who have valid and reliable opinions, identify requirements, options and key trends, and summarise them accurately
	1.6 Evaluate 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 strategy options
	1.7 Set up additional surveys where the information and opinions available are insufficient or in conflict
	1.8 Assess how the strategy options will affect different stakeholders and circulate the assessment to the stakeholders for comment and feedback
	1.9 Summarise the results of the consultations, and present the results to relevant decision-makers
2. Understand how to identify and consult on strategy options in planning and conservation	2.1 Describe what to identify as valid alternative strategy options, relevant surveys and research which address the most significant priority issues
	2.2 Describe what to identify as the stakeholders who are likely to be involved in and affected by the proposed strategy options
	2.3 Propose how to plan and set up methods of consultation which will produce the full range of valid opinion on the strategy options proposed



ABBE is a wholly owned subsidiary of Birmingham City University

	2.4 Explain how to present the strategy options to people and groups who are interested and informed
	2.5 Explain how to circulate the assessment of the strategy options to the stakeholders for comment and feedback
	2.6 Explain how to summarise feedback on strategy options
	2.7 Explain how to summarise requirements, options and key trends
	2.8 Describe how to identify requirements, options and key trends
	2.9 Explain how to consult specialists who have valid and reliable opinions
	2.10 Evaluate feedback against relevant criteria
	2.11 Describe what to identify to be the conflicting needs of different groups and users, and the level of support and opposition
	2.12 Describe what to describe as the possible effects of conflicting needs of different groups and users, on strategy options
	2.13 Propose how to set up additional surveys where the information and opinions available are insufficient or in conflict (synthesis)
	2.14 Examine how to assess how the strategy options will affect different stakeholders
	2.15 Explain how to summarise the results of consultations
	2.16 Explain how to present the results of consultations to relevant decision-makers



## Unit 9: Frame sustainable development policies in planning and conservation

Unit Reference Number: R/504/6841

Level: 6

Credit: 6

### Unit Summary

This unit is about evaluating the effectiveness of planning, conservation and development strategies by measuring performance against objectives, and targets and proposals. As part of the review process you will need to identify areas where improvements are needed, evaluate different methods for improvement and consult on the options available and recommend them to decision makers. You will also need to present a final draft plan to decision makers and submit final draft plan as part of adoption process.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to frame sustainable development policies in planning and conservation	1.1 Collate and organise all relevant information regarding agreed strategies in order to frame planning, conservation and development policy
	1.2 Engage with decision makers of organisation to obtain a strategic steer on policy direction
	1.3 Verify the key features of the agreed strategy through stakeholder engagement
	1.4 Identify and research any additional information required to complete the development of planning, conservation and development policies
	1.5 Analyse all available information to identify the key features of the planning, conservation and development policy and their deliverability
	1.6 Present the case for the policy to decision makers at the appropriate level of accountability
	1.7 Take account of feedback from decision makers and revise and finalise the planning, conservation and development policy accordingly
	1.8 Develop an implementation plan which includes all the relevant constraints and factors
2. Understand how to frame sustainable development policies in planning and conservation	2.1 Explain how to collate and organise all relevant information regarding agreed strategies in order to frame planning, conservation and development policy
	2.2 Explain how to engage with decision makers of your organisation to obtain a strategic steer on policy direction
	2.3 Examine how to verify the key features of the agreed strategy through consultation with stakeholders
	2.4 Describe what to identify as any additional information required to complete the development of planning, conservation and development policies



ABBE is a wholly owned subsidiary of Birmingham City University

	2.5 Examine how to research any additional information required to complete the development of planning, conservation and development policies
	2.6 Examine how to analyse all available information to identify the key features of the planning conservation and development policy
	2.7 Explain how to present the case for the policy to decision makers at the appropriate level of accountability
	2.8 Propose how to take account of feedback from decision makers and revise and finalise the planning, conservation and development policy accordingly
	2.9 Evaluate how to finalise the planning, conservation and development policy
	2.10 Propose how to develop an implementation plan which includes all the relevant constraints and factors



## Unit 10: Monitor the implementation of development policies in planning and conservation

Unit Reference Number: H/504/6844

Level: 6

Credit: 4

### Unit Summary

This unit is about evaluating the effectiveness of plans chosen to implement planning, conservation and development policies by measuring performance against objectives, and targets and proposals. As part of the review process you will need to identify areas where improvements are needed, evaluate different methods for improvement and consult on the options available and recommend them to decision makers. You will also need to present a final draft plan to decision makers and submit final draft plan as part of adoption process.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to monitor the implementation of development policies in planning and conservation	1.1 Submit the final draft plan as part of the adoption process
	1.2 Evaluate the plans that have been chosen to implement planning, conservation and development policy to check whether they are still effective and practical
	1.3 Measure performance against objectives, and targets and proposals
	1.4 Review the implementation methods and identify areas where improvements are needed
	1.5 Evaluate different methods for improvement and consult on the options with those who have an interest
	1.6 Select methods for improvement which are the most suitable and recommend them to decision makers
	1.7 Ensure that the findings of the report are made available
	1.8 Consider the results of the consultation and make any essential changes and re-consult where necessary
	1.9 Present the final draft plan to decision makers
	1.10 Monitor and review procedures regularly and act promptly to correct inefficiency
2. Understand how to monitor the implementation of development policies in planning and conservation	2.1 Evaluate the plans that have been chosen to implement planning, conservation and development policy
	2.2 Explain how to measure performance against objectives, and targets and proposals
	2.3 What to you identify as areas where improvements are needed
	2.4 Examine how to review the implementation methods
	2.5 Evaluate different methods for improvement



ABBE is a wholly owned subsidiary of Birmingham City University

	2.6 Explain how to consult on the options
	2.7 Evaluate how to select methods for improvement
	2.8 Propose how to recommend methods for improvement to decision makers
	2.9 Explain how to ensure that the findings of the report are made available
	2.10 Explain how to consider the results of the consultation and make any essential changes and re-consult where necessary
	2.11 Evaluate how to act to correct inefficiency
	2.12 Explain how to present the final draft plan to decision makers
	2.13 Explain how to submit the final draft plan as part of the adoption process
	2.14 Examine how to monitor procedures
	2.15 Examine how to review procedures



## Unit 11: Assess the sustainability of proposals in planning and conservation

Unit Reference Number: M/504/6846

Level: 6

Credit: 4

### Unit Summary

This unit concerns the analytic process for assessing the sustainability of proposals. It involves the development of sustainability criteria and a detailed review of the options available. It requires an understanding of the processes by which decisions are made on investments in conservation projects, the factors affecting these and the ability to seek and use these effectively. You will need to identify criteria for assessing environmental sustainability and apply them to the selected development proposals.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome</b> <b>The learner will:</b>	<b>Assessment Criterion</b> <b>The learner can:</b>
1. Be able to assess the sustainability of proposals in planning and conservation	1.1 Identify the requirements for assessing the sustainability of proposals by examining policy documents and consulting experts
	1.2 Review the factors which will be included in the assessment and the criteria to be used for assessing its impact
	1.3 Consider alternative solutions which will improve environmental quality and increase sustainability
	1.4 Ensure that the significance of each factor is assessed
	1.5 Record the results of the findings of the review for future reference
2. Understand how to assess the sustainability of proposals in planning and conservation	2.1 Describe how to identify the requirements for assessing the sustainability of proposals
	2.2 Examine how to review the factors which will be included in the assessment and the criteria to be used for assessing its impact
	2.3 Propose how to consider alternative solutions which will improve environmental quality and increase sustainability
	2.4 Explain how to ensure that the significance of each factor is assessed
	2.5 Explain how to record the results of the findings of the review for future reference



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 12: Provide advice to the public about policy, regulations and processes in conservation

Unit Reference Number: F/504/6849

Level: 6

Credit: 4

### Unit Summary

This unit is about providing advice on policy and regulatory requirements to people. You will need to check that people understand the requirements.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to provide advice to the public about policy, regulations and processes in conservation	1.1 Prepare clear and unambiguous information to explain the effects of existing, new or changed requirements
	1.2 Pass on information about requirements, in line with an agreed communication strategy, to people who have an interest
	1.3 Check that people clearly understand the requirements
	1.4 Assess the effectiveness of communication and identify any improvements so that people have proper access to the information that they are entitled to receive and that they understand it
2. Understand how to provide advice to the public about policy, regulations and processes in conservation	2.1 Explain how to prepare clear and unambiguous information to explain the effects of existing, new or changed requirements
	2.2 Explain how to pass on information about policy and regulatory requirements, in line with an agreed communication strategy, to people who have an interest
	2.3 Explain how to check that people clearly understand the requirements
	2.4 Examine how to assess the effectiveness of communication
	2.5 Describe what to identify as any improvements to communication, so that people have proper access to the information that they are entitled to receive and that they understand it



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 13: Manage and implement incentive schemes in planning and conservation

Unit Reference Number: A/504/6851

Level: 6

Credit: 4

### Unit Summary

In a planning context this unit concerns managing the process of making applications for grants. Grants might be given to encourage people to improve commercial or industrial premises and shop fronts, or to improve listed buildings, for example. In relation to the field of conservation this unit requires knowledge of the availability and administration of grant schemes for the repair and enhancement of historic buildings and areas. You will need to process applications for grants in line with agreed procedures and timescales. You will need to manage the grant regime in line with agreed policies and targets.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to process and determine applications for financial incentives	1.1 Acknowledge applications for incentives promptly and assess them against statutory and policy requirements
	1.3 Identify inconsistent and incomplete information in applications and ask applicants for more information, clarification and proof
	1.3 Assess applications against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria following detailed evaluation
	1.4 Reject applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revision, and prepare a justified rejection to send to unsuccessful applicants
	1.5 Evaluate in detail those applications which have been assessed positively, calculate the level of incentives and specify appropriate and realistic conditions
	1.6 Justify decisions clearly, draft the conditions in an appropriate format and pass it on to the applicant
	1.7 Check that applicants are complying with the conditions applying to incentives, identify those who are not and advise them on what they need to do to comply with the conditions
	1.8 Complete the decision making process within the time allowed and to meet statutory and policy requirements
2. Understand how to process and determine applications for financial incentives	2.1 Explain how to acknowledge applications for incentives
	2.2 Explain how to process those applications which are likely to meet the criteria
	2.3 Explain how to prepare a justified rejection to send to unsuccessful applicants
	2.4 Examine how to assess applications against the relevant technical regulations, policy and decision criteria



ABBE is a wholly owned subsidiary of Birmingham City University

	2.5 Evaluate how to reject applications which fail the assessment process and which are unlikely to meet the evaluation criteria following revisions
	2.6 Evaluate in detail those applications which have been assessed positively
	2.7 Examine how to assess applications against statutory and policy requirements
	2.8 Describe what to identify as inconsistent and incomplete information in applications
	2.9 Explain how to calculate the level of incentives
	2.10 Explain how to check that applicants are complying with the conditions applying to incentives
	2.11 Propose how to advise those applicants who are not complying with the conditions applying to incentives on what they need to do to comply with the conditions
	2.12 Evaluate how to specify appropriate and realistic conditions
	2.13 Explain how to pass decisions and conditions on to the applicant
	2.14 Explain how to complete the decision making process within the time allowed and to meet statutory and policy requirements
	2.15 Evaluate how to justify decisions and draft the conditions in an appropriate format
	2.16 Explain how to ask applicants for more information, clarification and proof
3. Be able to manage incentive schemes	3.1 Monitor and control an incentive scheme to ensure compliance
	3.2 Calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints
	3.3 Calculate the cost of incentive payments and commitments, deduct the total from the funding available and calculate the shortfall
	3.4 Prioritise the use of incentives to meet the constraints of the staff, resources, time and funding available
4. Understand how to manage incentive schemes	4.1 Examine how to monitor and control an incentive scheme to ensure compliance
	4.2 Explain how to calculate the cost of incentive payments and commitments
	4.3 How to deduct the total costs from the funding available and calculate the shortfall
	4.4 Examine how to prioritise the use of incentives to meet the constraints of the staff, resources, time and funding available
	4.5 Describe what to identify as the funding bodies available
	4.6 Describe what do identify as any time constraints
	4.7 Explain how to calculate the level of funding



## Unit 14: Determine and negotiate proposals in planning, conservation and building control

Unit Reference Number: F/504/6852

Level: 6

Credit: 8

### Unit Summary

This unit is about processing, assessing and determining building control proposals, town planning applications and conservation consents in the agreed manner. You will negotiate where necessary with the applicant and other interested parties.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to determine proposals against statutory and policy requirements	1.1 Assess proposals in detail against the relevant technical regulations, policy and evaluation criteria and process those which are likely to meet the evaluation criteria
	1.2 Identify inconsistent and incomplete information in proposals and ask applicants for more information, clarification and proof
	1.3 Evaluate in detail those applications which meet the assessment criteria, and identify the options available to process the applications
	1.4 Determine proposals in line with the evaluation criteria and prepare a report justifying the recommendations
	1.5 Draft the conditions or reasons for rejections in an appropriate legal format
	1.6 Complete the decision making process within agreed time and to meet legal requirements
2. Understand how to determine proposals against statutory and policy requirements	2.1 Examine how to assess proposals in detail against the relevant technical regulations, policy and evaluation criteria
	2.2 Explain how to process proposals which are likely to meet the criteria
	2.3 Describe what to identify as inconsistent and incomplete information in proposals
	2.4 Explain how to ask applicants for more information, clarification and proof
	2.5 Evaluate in detail those proposals which meet the assessment criteria
	2.6 Describe what to identify as the options available to process the proposal
	2.7 Evaluate how to determine proposals in line with the evaluation criteria
	2.8 Evaluate how to draft the conditions or reasons for rejections in an appropriate legal format within the report
	2.9 Explain how to complete the decision making process within agreed time limits and to meet legal requirements
3. Be able to negotiate the content of proposals	3.1 Consider the evaluation criteria and identify the scope for negotiation



ABBE is a wholly owned subsidiary of Birmingham City University

	3.2 Negotiate with applicants to change their proposals to meet the evaluation criteria
	3.3 Agree changes to proposals which meet the expectations which have been identified
	3.4 Complete the negotiation process within the agreed time limits and to meet legal requirements
4. Understand how to negotiate	4.1 Propose how to consider the evaluation criteria
	4.2 Describe what to identify as the scope for negotiation
	4.3 Propose how to negotiate with applicants to change their proposals to meet the evaluation criteria
	4.4 Evaluate how to agree changes to proposals which meet the expectations which have been identified
	4.5 Explain how to complete the negotiation process within the agreed time limits and to meet legal requirements



## Unit 15: Monitor compliance with statutory and policy requirements in planning, conservation and building control

Unit Reference Number: J/504/6853

Level: 6

Credit: 5

### Unit Summary

This unit is concerned with the monitoring of unauthorised building works and structures. You need to be able to identify unauthorised development or development that does not comply with planning, building control or conservation conditions and decide on the best steps to deal with it.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to monitor compliance with statutory and policy requirements in planning, conservation and building control	1.1 Monitor development against statutory and policy requirements, identify breaches in compliance and record them accurately
	1.2 Conform to safe working practices
	1.3 Summarise information about breaches in compliance and circulate the information to the people responsible for compliance and indicate the consequences of their actions
	1.4 Negotiate and agree, with the people responsible, acceptable changes which are needed to restore compliance
	1.5 Issue warnings of appropriate action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit
	1.6 Take follow up action in cases of breach of compliance
	1.7 Prepare and submit clear and accurate evidence of breaches to the appropriate authorities
	1.8 Check that people responsible continue to comply with legal requirements and take legal proceedings when people are still in default
	1.9 Record compliance evidence and circulate it to people who have an interest
2. Understand how to monitor compliance with statutory and policy requirements in planning, conservation and building control	2.1 Examine how to monitor development against statutory and policy requirements
	2.2 Describe what to identify as breaches in compliance
	2.3 Explain how to record breaches in compliance
	2.4 Explain how to conform to safe working practices
	2.5 Explain how to indicate to people responsible the consequences of their actions
	2.6 Explain how to prepare clear and accurate evidence of breaches



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Explain how to check that people responsible are continuing to comply with legal requirements and take legal proceedings when people are still in default
	2.8 Explain how to summarise information about breaches in compliance and circulate the information to the people responsible for compliance
	2.9 Explain how to issue warnings of possible enforcement action to the people responsible, for breaches in compliance which are not corrected within a realistic time limit
	2.10 Explain how to take follow up action in cases of breach of compliance
	2.11 Explain how to take legal proceedings when people are still in default
	2.12 Propose how to negotiate compliance, and acceptable changes which are needed to restore compliance with the people responsible
	2.13 Evaluate how to agree with the people responsible acceptable changes which are needed to restore compliance
	2.14 Explain how to submit clear and accurate evidence of breaches to the appropriate authorities
	2.15 Explain how to check that people responsible continue to comply with legal requirements
	2.16 Explain how to record and circulate compliance evidence



## Unit 16: Identify and evaluate community factors in planning and conservation

Unit Reference Number: L/504/6854

Level: 6

Credit: 4

### Unit Summary

In this unit you will need to consult the public and other stakeholders about intended changes in planning policy, and know how to address and balance their different views.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and evaluate community factors in planning and conservation	1.1 Identify what the members of the wider community expect, and might need from the project
	1.2 Investigate and identify how members of the community are likely to react to the project, and what their preferences are
	1.3 Investigate the requirements and preferences of the members of the community, and challenge and refine those which do not appear to be realistic
	1.4 Assess which options are valid and realistic, present them to stakeholders in the project, and agree them in writing
	1.5 Select a number of options for the project and evaluate each one against the requirements of the members of the community
	1.6 Recommend the options which best meet the requirements of the community, the stakeholders and the assets and keep records of them for later reference
2. Understand how to identify and evaluate community factors in planning and conservation	2.1 Describe what to identify that the members of the wider community expect, and might need from the project
	2.2 Examine how to assess what options are valid and realistic
	2.3 Evaluate how to agree options with stakeholders in writing
	2.4 Evaluate how to select a number of options for the project and evaluate each against the requirements of the members of the community
	2.5 Propose how to recommend the options which best meet the requirements of the community, stakeholders and the assets
	2.6 Explain how to keep records of solutions for later reference
	2.7 Describe what to identify as members of the community likely reactions to the project, and also their preferences
	2.8 Examine how to investigate how members of the community are likely to react to the project, and what their preferences are
	2.9 Examine how to investigate the requirements and preferences of the members of the community and challenge and refine those which do not appear to be realistic
	2.10 Explain how to present options to stakeholders



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 17: Agree a procurement method with stakeholders and analyse the use and procurement of resources in planning and conservation

Unit Reference Number: D/504/6857

Level: 6

Credit: 6

### Unit Summary

This unit requires an understanding of the process of procurement in relation to historic buildings and development areas. You will need to choose the most appropriate procurement procedure and agree it with all interested parties. This unit is about the strategic management of procurement processes. It is about identifying key requirements with stakeholders, resolving any conflicting demands and agreeing feasible and realistic procurement objectives and criteria. You will need to carry out an analysis of factors affecting the procurement and use of resources. Finally, you will need to produce a report on the availability, procurement and use of resource which will enable decision makers to develop a resource procurement strategy.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify and analyse the use and procurement of resources	1.1 Identify the areas of the development where resources will be needed and plan an investigation to quantify the resources and to decide where to obtain them
	1.2 Analyse the factors which will influence the procurement and use of resources and the relationship between them
	1.3 Identify and summarise potential opportunities and constraints that result from the analysis and assess the impact these might have on the practicability and efficiency of the development process and the financing and programming of the project
	1.4 Estimate the resources that will be needed and evaluate potential sources for obtaining them
	1.5 Analyse the critical path for the procurement and use of resources and build in sufficient buffers to optimise project programming
	1.6 Present the findings of the analysis to decision makers, note their advice and amend the analysis to reflect the feedback received
	1.7 Produce a report on the availability and the procurement and use of resources which will enable decision makers to develop a resource procurement strategy
2. Understand how to develop and maintain working relationships in planning, conservation and building control	2.1 Describe what to identify as the areas of the development where resources will be needed
	2.2 Describe what to identify as potential opportunities and constraints
	2.3 Explain how to summarise potential opportunities



ABBE is a wholly owned subsidiary of Birmingham City University

	2.4 Examine how to analyse the critical path for the procurement and use of resources and building in sufficient buffers to optimise project programming
	2.5 Examine how to estimate the resources that will be needed
	2.6 Propose how to plan an investigation to quantify the resources and to decide where to obtain them
	2.7 Examine how to analyse the factors which will influence the procurement and use of resources and the relationship between them
	2.8 Explain how to present the findings of the analysis to decision makers, note their advice and amend the analysis to reflect the feedback received
	2.9 Explain how to produce a report on the availability and the procurement and use of resources which will enable decision makers to develop a resource procurement strategy
3. Be able to select and agree a procurement method with stakeholders	3.1 Identify key requirements with stakeholders, resolve any conflicting demands between them, review their relative importance and risks, and confirm the priorities
	3.2 Identify and agree feasible and realistic procurement objectives and criteria including forms of contract
	3.3 Identify procurement methods and forms of contract which are capable of meeting the procurement objectives and evaluate them against selected criteria
	3.4 Select and recommend the most effective procurement methods and forms of contract which meet stakeholder constraints and relevant legal and statutory requirements
	3.5 Agree and record the selected procurement method and form of contract and appropriate implementation procedures
	3.6 Identify methods which are suitable for monitoring and controlling the procurement methods and forms of contract
4. Understand how to select and agree a procurement method with stakeholders	4.1 Describe what to identify as key stakeholder requirements
	4.2 Explain how to confirm priorities
	4.3 Examine how to review the relative importance and risks of conflicting priorities
	4.4 Propose how to resolve conflicting demands between stakeholders requirements
	4.5 Describe what to identify as feasible and realistic procurement objectives and criteria
	4.6 Evaluate how to agree feasible and realistic procurement objectives and criteria and forms of contract
	4.7 Describe what to identify as procurement methods and forms of contract which are capable of meeting the procurement objectives
	4.8 Evaluate procurement methods and forms of contract against selected criteria
	4.9 Evaluate how to agree the selected procurement methods and forms of contract appropriate implementation procedures
	4.10 Propose how to recommend the most effective procurement methods and forms of contract which meets stakeholder constraints and relevant legal and statutory requirements
	4.11 Evaluate how to select the most effective procurement methods and forms of contract which meets stakeholder constraints and relevant legal and statutory requirements



	4.12 Explain how to record the selected procurement methods and form of contract and appropriate implementation procedures
	4.13 Describe what to identify as methods which are suitable for monitoring and controlling the procurement methods and forms of contract



## Unit 18: Prepare project briefs and plans in planning and conservation

Unit Reference Number: H/504/6858

Level: 6

Credit: 8

### Unit Summary

In this unit you will need to advise project stakeholders about current regulatory and technological requirements and innovations to enable them to make informed decisions. You will also need to summarise and present the project requirements and stakeholder's preferences. You will need to investigate and assess the sustainability of development proposals in economic, social and environmental terms. In planning a project might include, for example, environmental or landscaping works, or improvements to a conservation area. You will also need to prepare and present proposals for a project and development brief. You will need to analyse the requirements of the brief and develop a project plan that meets stakeholder requirements.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to investigate and evaluate sustainable development requirements	1.1 Identify goals and priorities for potential development, both currently and in the future
	1.2 Investigate whether there is a justifiable need to undertake development and consider alternatives
	1.3 Investigate and identify the design, function and performance requirements of the potential project
	1.4 Investigate economic factors and resources, environmental and ecological factors, and social views that affect the future asset value and sustainability of potential development
	1.5 Evaluate the best balance between the potential asset value and sustainability and project design, function, performance and the return on investment
	1.6 Decide whether and how to implement potential sustainable development projects so as to achieve key requirements
2. Understand how to investigate and evaluate sustainable development requirements	2.1 Describe what to identify as goals and priorities for potential development
	2.2 Examine how to investigate whether there is a justifiable need to undertake development and consider alternatives
	2.3 Describe what to identify as the design, function and performance requirements of the potential project
	2.4 Examine how to investigate the design, function, and performance requirements of the potential project
	2.5 Examine how to investigate economic factors and resources, environmental and ecological factors, and social views that affect the future asset value and sustainability of potential development
	2.6 Evaluate the best balance between the potential asset value and sustainability and project design, function, performance and the return on the investment



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Evaluate how to decide whether and how to implement potential sustainable developments so as to achieve key requirements
3. Be able to identify, assess and agree project requirements and stakeholder preferences	3.1 Clarify the project stakeholders' understanding of project processes and the roles of those who need to be involved
	3.2 Identify and negotiate agreement with project stakeholders on what their goals and priorities are both now and for the future
	3.3 Identify the function and performance requirements for the project
	3.4 Clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project
	3.5 Advise project stakeholders about current regulatory and technological requirements and innovations to enable them to make informed decisions
	3.6 Summarise and present the project requirements and stakeholders' preferences
	3.7 Challenge project requirements and stakeholders' preferences which do not appear to be realistic, decide valid options and agree them in writing
4. Understand how to identify, assess and agree project requirements and stakeholder preferences	4.1 Explain how to clarify the project stakeholders' understanding of project processes and the roles of those who need to be involved
	4.2 Describe what to identify to be the project stakeholders' goals and priorities both now and in the future
	4.3 Propose how to negotiate agreement with the project stakeholders on what their goals and priorities are both now and in the future
	4.4 Describe what to identify as the function and performance requirements for the project
	4.5 Explain how to clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project
	4.6 Propose how to advise project stakeholders about current regulatory and technological requirements and innovations to enable them to make informed decisions
	4.7 Examine how to challenge project requirements and stakeholders' preferences
	4.8 Propose how to advise project stakeholders about current regulatory and technological requirements and innovations to enable them to make informed decisions
	4.9 Evaluate how to decide which options are valid and agree them in writing
	4.10 Explain how to summarise the project requirements and stakeholders' preferences
	4.11 Explain how to present the project requirements and stakeholders' preferences
5. Be able to prepare and present proposal for a project brief	5.1 Identify and agree the stakeholders' requirements, opinions and aspirations and prepare a framework for a proposed project
	5.2 Check any relevant investigations which have already been made, identify information which is not valid, and obtain additional valid information which is needed
	5.3 Select data which is relevant and valid, analyse it and qualify its status



	5.4 Estimate and confirm the cost and timescale of the project
	5.5 Prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders in the most effective way
	5.6 Explain and discuss any significant constraints, opportunities and areas of uncertainty
	5.7 Modify the draft to reflect the discussion and relevant points which have been raised
	5.8 Negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project
	5.9 Discuss the ways in which the brief can be worded so that it can be modified in the future, explain the implications of doing so, and keep an accurate record of any decisions
6. Understand how to prepare and present proposal for a project brief	6.1 Describe what to identify as stakeholders' requirements opinions and aspirations
	6.2 Evaluate how to agree the stakeholders' requirements, opinions and aspirations
	6.3 Explain how to explain and discuss any significant constraints, opportunities and areas of uncertainty
	6.4 Explain how to modify the draft to reflect the discussion and relevant points which have been raised
	6.5 Examine how to estimate and confirm the cost and timescale of the project
	6.6 Explain how to prepare a framework for a proposed project
	6.7 Explain how to prepare a draft brief clearly, accurately, unambiguously and within the time agreed
	6.8 Propose how to negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project
	6.9 Describe how to identify information which is not valid
	6.10 Explain how to obtain additional information which is needed
	6.11 Explain how to check any relevant investigations which have already been made
	6.12 Explain how to discuss the ways in which the brief can be worded so that it can be modified in the future explain the implications of modifying the brief and keep an accurate record of any decisions
	6.13 Evaluate how to select data which is relevant and valid
	6.14 Examine how to analyse data and quality its status
	6.15 Explain how to present the brief to stakeholders
7. Be able to prepare a project plan	7.1 Check and confirm with stakeholders that the requirements in the brief are accurate and clearly state the project development requirements
	7.2 Analyse the requirements of the brief and check and clarify initial assumptions about the project plan with stakeholders
	7.3 Develop a realistic outline project plan which takes account of identified constraints



	7.4 Discuss the outline project plan with stakeholders and agree any necessary modifications to the brief, outline project plan, or constraints
	7.5 Prepare, present and agree a project plan which meets the requirements of the brief and the expectations of stakeholders
8. Understand how to prepare a project plan	8.1 Explain how to check and confirm with stakeholders that the requirements in the brief are accurate and clearly stated
	8.2 Examine how to analyse the requirements of the brief
	8.3 Explain how to check and clarify the initial assumptions about the project plan in the draft brief
	8.4 Explain how to discuss the project plan with stakeholders
	8.5 Propose how to develop a realistic outline project plan
	8.6 Evaluate how to agree any necessary modifications to the brief, outline project plan, or constraints
	8.7 Explain how to prepare and present a project plan which meets the requirements of the brief and the expectations of stakeholders
	8.8 Evaluate how to agree a project plan which meets the requirements of the brief and the expectations of stakeholders



## Unit 19: Establish and coordinate a project team in planning and conservation

Unit Reference Number: K/504/6859

Level: 6

Credit: 4

### Unit Summary

This unit is about identifying and obtaining the services and resources that are needed to deliver a particular project. You will need to agree project roles and responsibilities within the team. You will also need to negotiate and agree a brief on the intended purpose, process and results of team activities.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to arrange project services and resources	1.1 Identify the services and resources that are needed, and select those that meet the agreed timescales and budget limits
	1.2 Negotiate and agree proposals for team membership which are likely to produce an effective team
	1.3 Evaluate services and resources and circulate the results to decision makers
	1.4 Follow the organisational procedures to obtain services and resources
	1.5 Produce appropriate project documentation and methodology for the organisations and people selected
	1.6 Confirm the arrangements in writing with stakeholders in a way which preserves goodwill and trust
2. Understand how to arrange project services and resources	2.1 Propose how to negotiate and agree proposals for team membership
	2.2 Describe what to identify as the services and resources that are needed
	2.3 Explain how to follow the organisational procedures for obtaining services and resources
	2.4 Evaluate how to select those services and resources that meet the agreed timescales and budget limits
	2.5 Explain how to circulate the results of evaluating services and resources to decision makers
	2.6 Evaluate services and resources
	2.7 Explain how to produce and confirm appropriate project documentation and methodology for the organisations and people selected
	2.8 Explain how to confirm the arrangements in writing with stakeholders in a way which preserves goodwill and trust
3. Be able to set up and establish a project team	3.1 Confirm the roles and capabilities of all those involved in the project
	3.2 Agree within the project team the allocation and control of project responsibilities and pass this information on to the stakeholders



ABBE is a wholly owned subsidiary of Birmingham City University

	3.3 Negotiate and agree a clear and accurate brief on the purpose, process and intended results of team activities
	3.4 Discuss and confirm the project plan with the project team
	3.5 Agree with the stakeholders and the project team, changes to the brief, project description and plan which improve the effectiveness of the results and the efficiency of the process
	3.6 Provide relevant information and clarification to the team
4. Understand how to set up and establish a project team	4.1 Explain how to confirm the roles and capabilities of all those involved in the project
	4.2 Explain how to discuss and confirm the project plan with the project team
	4.3 Explain how to provide relevant information and clarification to the team
	4.4 Propose how to negotiate a clear and accurate brief
	4.5 Evaluate how to agree a clear and accurate brief
	4.6 Evaluate how to agree within the project team the allocation and control of project responsibilities
	4.7 Explain how to pass information about the allocation and control of project responsibilities on to the stakeholders
	4.8 Evaluate how to agree with the stakeholders and the project team, changes to the brief, project description and plan



## Unit 20: Manage project risks and impacts in planning, conservation and building control

Unit Reference Number: D/504/6860

Level: 6

Credit: 5

### Unit Summary

This unit concerns the planning and monitoring of projects. It is about ensuring that risk management is effectively carried out. You will need to be able to identify and assess project risks, and suggest ways of managing them. You will need to be able to demonstrate that you are able to identify appropriate risk management methods for the circumstances.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to ensure that project risks and impacts are assessed	1.1 Review project information in order to identify risks and impacts that arise from the project
	1.2 Ensure that sufficient information on any risks and impacts relating to the project is obtained in order to identify their significance
	1.3 Ensure that significant risks and impacts of potential projects are assessed
	1.4 Check and confirm that risk management processes are undertaken
2. Understand how to ensure that project risks and impacts are assessed	2.1 Examine how to review project information in order to identify risks and impacts that arise from the project
	2.2 Explain how to ensure that sufficient information on any risks and impacts relating to the project is obtained in order to identify their significance
	2.3 Explain how to ensure that the significant risks and impacts of projects are assessed
	2.4 Explain how to check and confirm that risk management processes are undertaken
3. Be able to ensure that methods and procedures to manage project risks are specified and implemented	3.1 Confirm that accurate details of the risks and impacts have been obtained
	3.2 Ensure that the most effective risk management methods and procedures to manage risks are selected that comply with all relevant regulations and guidelines
	3.3 Ensure that the resources that are necessary to implement the risk management methods are identified
	3.4 Ensure that the activities required to implement the risk management methods are identified
	3.5 Ensure that the procedures to implement the risk management methods are specified clearly
	3.6 Ensure that the risk management methods and procedures are implemented and modified to meet changing circumstances
4. Understand how to ensure that methods and	4.1 Explain how to confirm that accurate details of the risks and impacts have been obtained



ABBE is a wholly owned subsidiary of Birmingham City University

procedures to manage project risks are specified and implemented	4.2 Explain how to ensure that the most effective risk management methods and procedures are selected
	4.3 Explain how to ensure that the resources and activities required to implement risk management methods are identified
	4.4 Explain how to ensure that risk management methods and procedures are implemented and maintained
	4.5 Explain how to ensure that the procedures for implementing the risk management methods are specified clearly
	4.6 Explain how to ensure that risk management methods and procedures are modified to meet changing circumstances



## Unit 21: Identify survey and information requirements in planning, conservation and building control

Unit Reference Number: H/504/6861

Level: 5

Credit: 3

### Unit Summary

This unit is concerned with preparing for a survey. The survey could be undertaken for any kind of building, land or for the wider environment using measuring equipment. It also requires the ability to advise on appropriate techniques and levels of recording required for historic buildings and sites affected by development proposals. You will need to prepare thoroughly for a survey, including for the choice of the correct equipment and for the due attention to safety.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to identify survey and information requirements in planning, conservation and building control	1.1 Identify what information is needed, how accurate it 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 Make a preliminary investigation to identify any access problems and equipment which will be needed, and assess the implications for the survey
	1.4 Identify an appropriate survey method statement, a programme and budget and agree them with the stakeholders
	1.5 Ensure that relevant permission is obtained to carry out the survey
	1.6 Identify and implement quality assurance and safety standards which are suitable for the survey
	1.7 Commission surveys by selecting people and organisations who are competent to do the work
2. Understand how to identify survey and information requirements in planning, conservation and building control	2.1 Describe what to identify as the information that is needed, how accurate it needs to be and what information outputs are required from the survey
	2.2 Evaluate how to decide what additional information is needed
	2.3 Evaluate how to agree an appropriate survey method, a programme and budget with the stakeholders
	2.4 Examine how to analyse and assess how accurate, up to date and complete the existing information is
	2.5 Evaluate how to commission surveys
	2.6 Describe what to identify as an appropriate survey method, programme and budget
	2.7 Examine how to make a preliminary investigation to identify any access problems and equipment which will be needed and assess the implications for the survey



ABBE is a wholly owned subsidiary of Birmingham City University

	2.8 Describe how to identify which quality assurance and safety standards as being suitable for the survey
	2.9 Explain how to ensure that the relevant permission is obtained to carry out the survey



## Unit 22: Plan, analyse and present test results in conservation

Unit Reference Number: K/504/6862

Level: 6

Credit: 3

### Unit Summary

This unit is about planning, developing and agreeing a specification for a testing programme, commissioning tests and presenting the data analyses and commentary to stakeholders.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to plan, analyse and present test results in conservation	1.1 Identify factors that may be significant to the object and purpose of the test through examination of documents, set up and hold discussions and meetings
	1.2 Identify what data is needed, how accurate the data needs to be and what data outputs are required
	1.3 Develop a clear and accurate specification, criteria, a programme and assessment of resources for the testing programme, and agree them with the stakeholders
	1.4 Commission tests for particular objects and purposes by selecting competent people and organisations to do the work
	1.5 Review and analyse the data from tests whilst maintaining accuracy and integrity
	1.6 Produce a clear and accurate commentary and interpretation of the data
	1.7 Present the data analyses and commentary clearly and in a format which is suitable for the stakeholders who need to use the findings
	1.8 Advise users on how to interpret the test data
2. Understand how to plan, analyse and present test results in conservation	2.1 Describe what to identify as factors that may be significant to the object and purpose of the test through examination of documents
	2.2 Propose how to set up and hold discussions and meetings
	2.3 Propose how to develop a clear and accurate specification, criteria, programme and assessment of resources for the testing programme
	2.4 Evaluate how to agree the specification and assessment of resources for the testing programme
	2.5 Describe how to identify what data is needed, how accurate it needs to be and what data outputs are required
	2.6 Evaluate how to commission tests
	2.7 Examine how to review and analyse the data from tests
	2.8 Explain how to produce a clear and accurate commentary and interpretation of the data
	2.9 Explain how to present the data, analyses and commentary
	2.10 Propose how to advise users on how to interpret the test data



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 23: Analyse and present measured survey information in conservation and building control

Unit Reference Number: M/504/6863

Level: 5

Credit: 5

### Unit Summary

This unit is concerned with carrying-out, recording, analysing and presenting the results of a measured survey. The survey could be undertaken for any kind of building, land or for the wider environment using measuring equipment. It also requires the ability to advise, on appropriate techniques and levels of recording required for historic buildings and sites affected by development proposals. You will need to be able to undertake a measured survey with the required level of accuracy, and record the results. You will need to be able to analyse and verify survey data and present this information to stakeholders in an appropriate format.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to observe and record measurements	1.1 Conduct the survey in a way which maintains the level of accuracy required, balances content and cost and keeps disruption to a minimum
	1.2 Conform to safe working practices
	1.3 Consult with experts when specialist information is needed which is relevant to the survey
	1.4 Adapt work procedures and practices to allow for different circumstances and conditions
	1.5 Obtain and record survey data clearly and accurately and store it securely for later analysis
	1.6 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
	1.7 Ensure that the survey equipment is operated, maintained, transported and stored in accordance with the manufacturer's recommendations and safe working practices
2. Understand how to observe and record measurements	2.1 Explain how to conduct the survey
	2.2 Explain how to consult with experts when specialist information is needed which is relevant to the survey
	2.3 Explain how to obtain, record and store survey data
	2.4 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
	2.5 Explain how to conform to safe working practices
	2.6 Explain how to adapt work procedures and practices to allow for different circumstances and conditions



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Explain how to ensure that the survey equipment is operated, maintained and stored in accordance with the manufacturer's recommendations and safe working practices
3. Be able to analyse and present survey information	3.1 Collect together sufficient survey information to allow an accurate analysis to be made
	3.2 Check and verify the survey information to maintain accuracy and integrity
	3.3 Analyse the survey information accurately
	3.4 Present 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
	3.5 Advise people who will be using the survey information on how to interpret it
4. Understand how to analyse and present survey information	4.1 Explain how to collect together sufficient survey information to allow an accurate analysis to be made
	4.2 Explain how to check and verify the survey information to maintain accuracy and integrity
	4.3 Examine how to analyse the survey information accurately
	4.4 Propose how to advise people who will be using the survey information on how to interpret it
	4.5 Explain how to present 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



## Unit 24: Organise an investigation in planning, conservation and building control

Unit Reference Number: T/504/6864

Level: 4

Credit: 3

### Unit Summary

This unit is about commissioning and organising an investigation. You will need to be able to identify the factors requiring investigation. You will need to organise an investigation. You will need to be able to select methods and techniques to carry out the investigation.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to organise an investigation in planning, conservation and building control	1.1 Identify the purpose of the investigation
	1.2 Identify the factors for investigation that may be significant for the proposals by examining documents, setting up and facilitating discussions and meetings
	1.3 Select the critical aspects of both the site and the surrounding areas which require investigation and prioritise them
	1.4 Agree the priorities for investigation, an accurate estimate of the time and costs involved, and summarise both the priorities and estimates in an investigation brief
	1.5 Obtain necessary permission and insurance for the investigation
	1.6 Contact people and organisations who will be affected by the investigation, provide them with clear and accurate information and ask for their cooperation
	1.7 Choose methods and techniques for the investigation which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public
	1.8 Commission an investigation by selecting people and organisations who are competent to do the work
2. Understand how to organise an investigation in planning, conservation and building control	2.1 Describe how to identify the purpose of the investigation
	2.2 Explain how to obtain necessary permission and insurance for the investigation
	2.3 Explain how to summarise the priorities and estimates in an investigation brief
	2.4 Examine how to prioritise the critical aspects of both the site and the surrounding areas which require investigation
	2.5 Describe how to identify the factors for the investigation, that may be significant for the proposals
	2.6 Evaluate how to agree the priorities for investigation and an accurate estimate of the time and costs involved
	2.7 Explain how to contact people and organisations that will be affected by the investigation, provide them with clear and accurate information, and ask for their cooperation



ABBE is a wholly owned subsidiary of Birmingham City University

	2.8 Evaluate how to select the critical aspects of both the site and the surrounding areas which require investigation
	2.9 Evaluate how to choose methods and techniques for the investigation which are valid, reliable and consistent with legal requirements and recognise public concerns
	2.10 Evaluate how to commission an investigation



## Unit 25: Select, test and refine project solutions in planning and conservation

Unit Reference Number: F/504/6866

Level: 6

Credit: 6

### Unit Summary

This unit requires you to identify and select existing approaches consistent with the brief and also obtain new sources of information and ideas if necessary. You will also need to develop and refine options, testing them and rejecting those that fail to meet the selected parameters. You will then need to recommend modifications to the brief and assess the implications. You will also need to record test results and feasible options.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to select, test and refine project solutions in planning and conservation	1.1 Reject options which fail to meet the parameters and identify more likely alternatives
	1.2 Identify existing approaches which are potentially consistent with the brief and select those which are most likely to contribute to solutions
	1.3 Obtain new sources of information and ideas, where existing approaches do not meet the parameters of the brief, which have the potential to suggest new and innovative solutions
	1.4 Develop the options which appear to have the greatest potential for success so that they are capable of testing
	1.5 Discuss the selected options with project team members, assess their observations and noting them for future reference
	1.6 Select and commission tests which will give valid and relevant information about the options
	1.7 Implement and monitor tests so that the validity of the options are maintained, and match the results to significant parameters of the brief
	1.8 Record test results and feasible options accurately
	1.9 Refine options which meet the parameters of the brief and test them repetitively until their ability to meet the selected parameters is clearly established
	1.10 Recommend modifications to the brief to allow the consideration of selected options and approaches which have the potential to meet the parameters, but fail to meet all the brief requirements
	1.11 Assess the implications of the modified brief so that the overall integrity is retained and present them in sufficient details to enable decision makers to select options
2. Understand how to select, test and refine project solutions in planning and conservation	2.1 Explain what existing approaches do you identify as potentially consistent with the brief and selected as most likely to contribute to solutions
	2.2 Explain how to discuss the selected options with project team members and note their observations for future reference



ABBE is a wholly owned subsidiary of Birmingham City University

	2.3 Examine how to assess project team members' observations
	2.4 Examine how to assess the implications of the modified brief
	2.5 Evaluate how to select those approaches which are most likely to contribute to project solutions
	2.6 Propose how to develop the options
	2.7 Evaluate how to select and commission appropriate tests
	2.8 Describe what to identify as likely alternative options
	2.9 Explain how to obtain new sources of information
	2.10 Propose how to recommend modifications to the brief
	2.11 Evaluate how to reject options which fail to meet the parameters
	2.12 Explain how to implement tests
	2.13 Explain how to record and present test results and feasible options
	2.14 Examine how to test options
	2.15 Examine how to monitor tests
	2.16 Propose how to match the results of tests to significant parameters of the brief
	2.17 Explain how to present test results



## Unit 26: Prepare technical specifications and schedules in conservation

Unit Reference Number: J/504/6867

Level: 6

Credit: 3

### Unit Summary

This unit is about producing specifications and schedules which are based on valid information. You will need to be able to select the appropriate type of specification, and to complete it accurately. You will also need to obtain any necessary checks and approvals to ensure that the presentation and content are valid.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to prepare technical specifications and schedules in conservation	1.1 Produce specifications and schedules for the purpose which are based on identified, applicable source information
	1.2 Confirm that the source information is valid and obtain accurate, supplementary information if required
	1.3 Collate the sections in the specification and schedules so that they are based upon elements of a type appropriate to the circumstances and requirements
	1.4 Select, draft and amend technical clauses from relevant sources, which define the quality, type and standard of the materials, components and finished work
	1.5 Produce detailed schedule of works which are accurate, and contain a complete statement of the project needs and the range of services which will be needed
	1.6 Plan the schedule of works so that they are achievable with the resources available
	1.7 Draft the schedule of works in a format which is appropriate to the type and scope of the work
	1.8 Check that specifications and schedules are consistent with the other documentation, and update them promptly and accurately when the circumstances change
	1.9 Obtain necessary checks and approvals to ensure that the content and presentation of specifications and schedules are valid
2. Understand how to prepare technical specifications and schedules in conservation	2.1 Explain how to produce specifications and schedules for the purpose which is based on identified and current source information
	2.2 Explain how to confirm that the source information is valid
	2.3 Explain how to obtain accurate, supplementary information
	2.4 Explain how to collate the sections in the specifications and schedules
	2.5 Evaluate how to select, draft and amend technical clauses from relevant sources which define the quality, type and standard of the materials, components and finished work



ABBE is a wholly owned subsidiary of Birmingham City University

	2.6 Explain how to produce detailed schedules of works
	2.7 Propose how to plan the schedules of works so that they are achievable with the resources available
	2.8 Evaluate how to draft the schedules of works
	2.9 Explain how to check that the specifications and schedules are consistent with the other documentation and update them promptly and accurately when the circumstances change
	2.10 Explain how to obtain necessary checks and approvals to ensure that the content of specifications and schedules are valid



## Unit 27: Prepare, present and advise on project recommendations in conservation

Unit Reference Number: L/504/6868

Level: 6

Credit: 4

### Unit Summary

This unit requires an ability to present recommendations, proposals and project options to both professional and lay audiences. You need to be able to assess options against the brief, consult with interested parties and negotiate modifications where necessary.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to prepare and present project recommendations	1.1 Choose presentation methods and techniques which make the best use of resources and have the potential to communicate project options clearly
	1.2 Agree with the project team and the client the purpose of the presentation and the presentation methods which will be used
	1.3 Prepare clear and accurate presentational materials which support the project options and use them to facilitate discussions
	1.4 Present the recommendations, proposals and project options clearly and objectively and show how they are justified by the requirements of the brief
	1.5 Present the information in a way which promotes the goodwill and trust of the audience
	1.6 Provide valid evidence to support changes to the agreed criteria in cases where the project proposal or options do not meet all the requirements of the brief
	1.7 Encourage the audience to ask questions, ask for clarification and to make comments at appropriate stages in the presentation and provide additional information to ensure their understanding
	1.8 Define, agree and record amendments and variations which are required by the client
2. Understand how to prepare and present project recommendations	2.1 Explain how to show how recommendations, proposals and project options are justified by the requirements of the brief
	2.2 Explain how to provide valid evidence to support necessary changes to the agreed criteria
	2.3 Evaluate how to choose presentation methods and techniques
	2.4 Evaluate how to agree with the project team and the client the purpose of the presentation and the presentation methods which will be used
	2.5 Explain how to present the recommendations, proposals and project option
	2.6 Explain how to prepare clear and accurate presentation materials and use them to facilitate discussions



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Explain how to encourage the audience to ask questions, ask for clarification and to make comments at appropriate stages in the presentation
	2.8 Explain how to provide additional information to the audience to ensure their understanding
	2.9 Evaluate how to define, agree and record amendments and variations which are required by the client
3. Be able to advise on the selection and modification of project recommendations	3.1 Identify elements of the solutions which meet the requirements of the original brief and any subsequent modifications
	3.2 Identify changes in the project that are not reflected in any formal variations to the brief
	3.3 Advise people who have an interest on how well the proposals match the objective criteria in the brief
	3.4 Advise people who have an interest on the creative interpretation of the brief and overall project solution
	3.5 Explain how the overall project solution can meet both the technical and functional constraints in the brief, the requirements of the client and regulatory authorities
	3.6 Advise people who have an interest in the project and ensure that they understand the implications of accepting, modifying or rejecting proposals
	3.7 Advise people who have an interest on how much more advice, research and consultancy will be necessary to produce a project solution which is acceptable
	3.8 Confirm with the people who have an interest whether recommendations are accepted, modified or rejected
4. Understand how to advise on the selection and modification of project recommendations	4.1 Explain how to explain how the overall project solution can meet both the technical and functional constraints in the brief, and the requirements of the client and regulatory authorities
	4.2 Propose how to advise people who have an interest on how well the proposals match the objective criteria in the brief
	4.3 Propose how to advise people who have an interest in the creative interpretation of the brief and overall project solution
	4.4 Propose how to advise people who have an interest on the implications of accepting, modifying or rejecting proposals
	4.5 Explain how to ensure that people who have an interest in the project understand the implications of accepting, modifying or rejecting proposals
	4.6 Propose how to advise people who have an interest on how much more advice, research and consultancy will be necessary
	4.7 Describe how to identify what elements of the solution as meeting the requirements of the original brief and any subsequent modifications
	4.8 Describe how to identify what changes in the project as not being reflected in any formal variations to the brief
	4.9 Explain how to confirm with people who have an interest whether the recommendation are accepted, modified or rejected



## Unit 28: Evaluate and advise on energy factors in conservation

Unit Reference Number: H/504/6911

Level: 6

Credit: 6

### Unit Summary

This unit is about collating and recording information and providing advice on energy efficiency. It also concerns the whole life cost of a building project in terms of embodied energy and carbon. You will need to be able to establish the future energy needs of a property and assess and review the whole life energy, together with making recommendations for the most viable options.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to collate and evaluate information for the assessment of energy efficiency	1.1 Provide practical advice based on the ratings and recommendations of the energy efficiency report
	1.2 Explain to the client that an Energy Performance Certificate is a legally required document in certain circumstances, that its form and content is prescribed, and that it has to be accompanied by cost-effective recommendations
	1.3 Explain to the client the terms and conditions for energy assessment
	1.4 Explain to the client the limitations and constraints of the planned energy assessment
	1.5 Identify any circumstances that prevent you from undertaking an energy assessment and explain the reasons to the client politely and clearly
	1.6 Identify and collate information for the assessment of the energy efficiency of the property
	1.7 Follow the correct procedures for collecting information to enable the energy efficiency of the property to be determined
	1.8 Keep your notes and records legible, complete and accurate
	1.9 Evaluate the collated information to calculate the energy efficiency rating of the property
2. Understand how to collate and evaluate information for the assessment of energy efficiency	2.1 Explain how to explain to the client that an Energy Performance Certificate is a legally required document in certain circumstances, that its' form and content is prescribed, and that it has to be accompanied by cost-effective recommendations
	2.2 Explain to the client the terms and conditions under which you will undertake an energy assessment
	2.3 Explain how to explain to the client the limitations and constraints of the planned energy assessment
	2.4 Describe what to identify as any circumstances that prevent you from undertaking and energy assessment
	2.5 Describe what to identify as information required for the assessment of the energy efficiency of the property
	2.6 Explain how to explain the reasons to the client politely and clearly



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Explain how to collate information for the assessment of the energy efficiency of the property
	2.8 Explain how to collect information to enable the energy efficiency of the property to be determined
	2.9 Explain how to keep your notes and records legible, complete and accurate
	2.10 Evaluate the collated information and calculate the energy efficiency rating of the property
	2.11 Explain how to provide practical advice based on the ratings and recommendations of the energy efficiency report
3. Be able to assess, and advise on embodied energy and whole life costs	3.1 Confirm energy goals and priorities for the asset and assess current and future needs
	3.2 Confirm assumptions about embodied energy and use options for the asset with stakeholders
	3.3 Review the potential whole life energy and carbon content of the asset from historical analysis and the conservation, repair and maintenance programme information
	3.4 Assess and quantify the whole life energy and carbon cost implications for the asset taking into account the views of experts and stakeholders
	3.5 Review the whole life energy and carbon costs against the asset's significance and energy goals and priorities
	3.6 Select and recommend the most viable options and present them clearly and accurately
4. Understand how to assess, and advise on embodied energy and whole life costs	4.1 Explain how to confirm energy goals and priorities for the asset, both currently and in the future
	4.2 Examine how to assess the current and future needs of the asset
	4.3 Explain how to confirm assumptions about embodied energy and use options for the asset with stakeholders
	4.4 Examine how to review the potential whole life energy and carbon content of the asset from historical analysis
	4.5 Examine how to assess and quantify the whole life energy and carbon cost implications for the asset taking into account the views of experts and project stakeholders
	4.6 Examine how to review the whole life energy and carbon costs against the asset's significance and energy goals and priorities
	4.7 Evaluate how to select the most viable options and present them clearly and accurately
	4.8 Propose how to recommend the most viable options and present them clearly and accurately



**\*This unit is mandatory in Culture, but is optional in the Condition Pathway**

**Unit 29: Analyse research and report on historic and heritage assets in conservation**

Unit Reference Number: J/504/6870

Level: 6

Credit: 6

**Unit Summary**

This unit is about undertaking research to establish the cultural significance (and any designations) of assets. You will need to collect, collate, analyse and evaluate investigation data. You will need to report on the relative historic and heritage value, interest, character and significance in order to understand their status, condition and behaviour over time. You will also need to record statements of interest, character and significance and lodge in appropriate archives.

**Assessment Guidance**

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to research information on historic and heritage assets	1.1 Identify the priorities and factors for investigation and research that may be significant to establishing the cultural significance (and any designations) of assets
	1.2 Identify investigation sources and collect and collate relevant data
	1.3 Analyse and evaluate the investigation data which has been collected about all of the significant factors affecting the assets
	1.4 Identify complex issues and obtain specialist advice by providing an accurate summary of the problems
	1.5 Incorporate this specialist advice, and resolve conflicts where necessary
	1.6 Identify and accurately record aspects of the assets in relation to the purpose of the research
2. Understand how to research information on historic and heritage assets	2.1 Describe what to identify as the priorities and factors for investigation and research that may be significant to establishing the cultural significance (and any designations) of assets
	2.2 Describe what to identify as investigation sources and the collection and collation of relevant data
	2.3 Examine how to analyse the investigation data which has been collected about all of the significant factors affecting the assets
	2.4 Evaluate the investigation data which has been collected about all of the significant factors affecting the assets
	2.5 Describe what to identify as complex issues
	2.6 Explain how to obtain specialist advice
	2.7 Explain how to incorporate specialist advice, and resolve conflicts where necessary
	2.8 Describe how to identify aspects of the assets in relation to the purpose of the research
	2.9 Explain how to accurately record aspects of the assets in relation to the purpose of the research



ABBE is a wholly owned subsidiary of Birmingham City University

3. Be able to analyse and report on the significance of historic and heritage assets	3.1 Collate, review and interpret the results of investigations and research in order to gain an overview of the potential views on the cultural and heritage value of assets
	3.2 Analyse information sources relating to assets and identify their relative cultural and heritage value, their interest, character and significance in order to understand their status, condition and behaviour over time
	3.3 Consult with experts on specific issues which are relevant to the assessment and which are beyond personal experience by providing them with an accurate summary of the problems
	3.4 Record statements of cultural interest, character and significance
	3.5 Archive records which are clear, accurate and complete and conform to accepted professional and statutory requirements
4. Understand how to analyse and report on the significance of historic and heritage assets	4.1 Explain how to collate the results of investigations and research in order to gain an overview of the potential views on the cultural and heritage value of assets
	4.2 Examine how to review and interpret the results of investigations and research in order to gain an overview of the potential views on the cultural and heritage value of assets
	4.3 Examine how to analyse information sources relating to assets
	4.4 Describe what to identify as the relative historic and heritage value, interest, character and significance of assets in order to understand their status, condition and behaviour over time
	4.5 Explain how to consult with experts on specific issues which are relevant to the assessment and which are beyond personal experience by providing them with an accurate summary of the problems
	4.6 Explain how to record statements of interest, character and significance and lodge in an appropriate archive
	4.7 Explain how to archive records which are clear, accurate and conform to accepted professional and statutory requirements



## Unit 30: Prepare applications to secure statutory consents in planning and conservation

Unit Reference Number: R/504/6872

Level: 6

Credit: 5

### 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 The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to prepare applications to secure statutory consents in planning and conservation	1.1 Identify which aspects of the project are subject to statutory controls and which 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 applications to secure statutory consents in planning and conservation	2.1 Describe what to identify as aspects of the project which are subject to statutory controls and which 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
	2.3 Explain how to provide the consent authorities with additional clear, relevant and accurate information when it is requested
	2.4 Explain how to prepare and assemble the information that will be needed for the application
	2.5 Explain how to prepare and submit a clear and valid application for the consent
	2.6 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



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Explain how to circulate information about the implications of delays, failure to apply for and achieve consent to the stakeholders
	2.8 Describe what to identify as the implications of delays
	2.9 Propose how to plan alternatives with the client in anticipation of approval being refused
	2.10 Evaluate how to manage negotiations with the consent authorities to secure consents
	2.11 Evaluate how to agree alternatives with the client in anticipation of approval being refused



## Unit 31: Prepare graphical information in conservation and building control

Unit Reference Number: Y/504/6873

Level: 5

Credit: 3

### Unit Summary

In this unit you will need to be able to produce drawings and graphics to illustrate a building regulation scheme.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to prepare graphical information in conservation and building control	1.1 Produce graphical information which is complete, accurate, and complies with the design information
	1.2 Produce graphical information which is suitable for the purpose
	1.3 Select methods and media which are suitable for the graphical information required, and which can be produced with the resources and time available
	1.4 Use standard conventions and identify and justify any deviations from them
	1.5 Clarify any information to be included which is incomplete and inconsistent and make accurate amendments
	1.6 Keep registers and records of graphical information which are complete, accurate and up-to-date
	1.7 Obtain necessary checks and approvals for the content and presentation of graphical information
	1.8 Use methods for production and record keeping which are consistent with quality assurance procedures
2. Understand how to prepare graphical information in conservation and building control	2.1 Explain how to produce graphical information which is complete, accurate and complies with the design information
	2.2 Explain how to produce graphical information which is suitable for the purpose
	2.3 Evaluate how to select methods and media
	2.4 Describe what to identify as deviations from conventions
	2.5 Explain how to use standard conventions
	2.6 Evaluate how to justify any deviations from conventions
	2.7 Explain how to clarify any information to be included which is incomplete and inconsistent, and make accurate amendments
	2.8 Explain how to keep registers and records of graphical information
	2.9 Explain how to obtain necessary checks and approvals for the content and presentation of graphical information
	2.10 Explain how to use methods for production and record keeping which are consistent with quality assurance procedures



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 32: Implement resource efficient procurement processes in conservation

Unit Reference Number: D/504/6874

Level: 6

Credit: 6

### Unit Summary

This unit is about developing a procurement programme, short listing and selecting appropriate tenderers. It is also about the review and amendment of tender documents and ensuring that addenda are issued. You will need to negotiate and agree formal contractual arrangements for the implementation and operation of supply chain requirements. You will need to develop a potential list of tenderers who meet the contract criteria. You will also need to send prequalification tender enquiries to potential tenderers and evaluate those that respond in order to shortlist them against chosen selection criteria. You will need to select an appropriate tender. You will also need to review tender documents to ensure that they cover the scope of work and also ensure that they are issued.

You will also need to investigate any errors reported by tenderers, amend tender documents and ensure that addenda are reissued. You will need to acknowledge and evaluate tenders against the agreed criteria and modify and repeat the tender process where necessary. You will need to choose the best tenderer, appoint them formally, and notify the unsuccessful tenderers. You will also need to negotiate and agree any variations, adjustments and corrections with the tenderer prior to contract. You will need to acknowledge and evaluate tenders against the agreed criteria and modify and repeat the tender process where necessary. You will need to choose the best tenderer, appoint them formally, and notify the unsuccessful tenderers. You will also need to negotiate and agree any variations, adjustments and corrections with the tenderer prior to contract.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to develop a procurement programme	1.1 Confirm the areas of the asset for which resources will need to be procured and identify potential sources for obtaining them
	1.2 Develop a detailed and accurate procurement programme in an appropriate format and identify the lead times for ordering and receiving essential resources
	1.3 Identify any inconsistencies and unacceptable variations in the procurement programme, specify and agree with stakeholders the ways in which supply chain requirements will be managed and aligned
	1.4 Identify and agree, with all partners, the changes to the supply chain requirements which are necessary to meet asset standard and technical and quality requirements
	1.5 Develop and implement appropriate tests and trials, assess the results, identify problems and make appropriate decisions before moving to full implementation
	1.6 Check that supply chain routes conforms to the asset requirements



ABBE is a wholly owned subsidiary of Birmingham City University

	1.7 Negotiate and agree formal approvals and contractual arrangements for the implementation and operation of the supply chain requirements
	1.8 Integrate the procurement programme so that it is consistent with the requirements of the overall programme, statutory bodies and others who will be affected
2. Understand how to develop a procurement programme	2.1 Explain how to confirm the areas of the asset for which resources will need to be procured
	2.2 Describe what to identify as potential sources for obtaining resources
	2.3 Propose how to develop a detailed and accurate procurement programme
	2.4 Describe what to identify within the procurement programme as the lead times for ordering and receiving essential resources
	2.5 Describe what to identify as inconsistencies and unacceptable variations in the procurement programme
	2.6 Evaluate how to specify and agree with stakeholders the ways in which supply chain requirements will be managed and aligned
	2.7 Describe what to identify with partners, as the necessary changes to the supply chain requirements
	2.8 Evaluate how to agree with all partners, the changes to the supply chain requirements which are necessary to meet asset standard and technical and quality requirements
	2.9 Propose how to develop appropriate tests and trials
	2.10 Explain how to implement appropriate tests and trials
	2.11 Examine how to assess the results of the tests and trials
	2.12 Describe what to identify as problems with the results of the tests and trials before moving to full implementation
	2.13 Evaluate how to make decisions before moving to full implementation of the test and trials
	2.14 Explain how to check that the supply chain routes conform to asset requirements
	2.15 Propose how to negotiate formal approvals and contractual arrangements for the implementation and operation of supply chain requirements
	2.16 Evaluate how to agree formal approvals and contractual arrangements for the implementation and operation of supply chain requirements
	2.17 Propose how to integrate the procurement programme so that it is consistent with the requirements of the overall programme, statutory bodies and other who will be affected
3. Be able to evaluate and select potential tenderers	3.1 Select an appropriate type of procurement process and decide which potential tenderers could meet the contract specification
	3.2 Decide how many tenderers to invite, taking into account the quality of the asset
	3.3 Send enquiries to potential tenderers, in accordance with regulatory requirements, and require them to provide evidence about their experience and capability
	3.4 Choose selection criteria which are suited to the quality of the asset and for the type of work described in the tender



	3.5 Check that supply chain routes conform to the asset requirements
	3.6 Negotiate and agree formal approvals and contractual arrangements that set out the requirements for the implementation and operation of supply chain requirements
	3.7 Evaluate potential tenderers who respond to the invitation against the selection criteria, place them in rank order and choose the number needed
	3.8 Offer advice and information to decision makers about potential tenderers and the selection criteria and modify the tender list to reflect any changes which are agreed
	3.9 Confirm that the selected tenderers are willing to tender
	3.10 Consider adding more potential tenderers from the evaluation list which meet the selection criteria if those contacted are not willing to tender
4. Understand how to evaluate and select potential tenderers	4.1 Evaluate how to select an appropriate type of procurement process and decide which potential tenderers could meet the contract specification
	4.2 Evaluate how to decide how many tenderers to invite taking into account the quality of the asset
	4.3 Evaluate how to decide which potential tenderers could meet the contract specification
	4.4 Explain how to confirm that the selected tenderers are willing to tender
	4.5 Explain how to send enquiries to potential tenderers requiring them to provide evidence about their experience and capability
	4.6 Evaluate how to choose selection criteria which are suited to the quality of the asset and for the type of work described in the tender
	4.7 Explain how to modify the tender list to reflect any changes which are agreed
	4.8 Propose how to negotiate formal approvals and contractual arrangements that set out the requirements for the implementation and operation of supply chain requirements
	4.9 Evaluate how to agree formal approvals and contractual arrangements that set out the requirements for the implementation and operation of supply chain requirements
	4.10 Examine how to place potential tenderers in rank order
	4.11 Evaluate potential tenderers and choose the number of tenderers needed
	4.12 Explain how to confirm that the selected tenderers are willing to tender
	4.13 Propose how to consider adding more potential tenderers from the evaluation list which meet the selection criteria if those contacted are not willing to tender
	4.14 Propose how to offer advice and information to decision makers about potential tenderers and the selection criteria
	4.15 Explain how to check that the supply chain routes conform to the asset requirements
5. Be able to obtain estimates, bids and tenders	5.1 Collate and issue procurement documents which meet statutory regulations, codes of practice and the organisations policies to all the tenderers on the agreed list, following the agreed procedures



	5.2 Respond to queries from tenderers promptly and pass on any additional information which they need
	5.3 Store the tenders received in a secure place and open them on the closing date in line with the organisation's procedures and regulatory requirements
	5.4 Investigate any errors, omissions and ambiguities which are reported by tenderers and amend the procurement documents to correct them and ensure that addendums are re-issued
	5.5 Keep accurate records of procurement documents issued, feedback, queries and information from tenderers
	5.6 Agree and implement action when tenderers withdraw from the process
6. Understand how to obtain estimates, bids and tenders	6.1 Explain how to collate and issue procurement documents to all the tenderers
	6.2 Explain how to respond to queries from tenderers and pass on any information which tenderers need
	6.3 Explain how to store and open the tenders received
	6.4 Explain how to amend the procurement documents to correct any errors, omissions or ambiguities and ensure that addendums are reissued
	6.5 Examine how to investigate any errors, omissions and ambiguities which are reported by tenderers
	6.6 Explain how to keep accurate records of procurement documents issued, feedback, queries and information from tenderers
	6.7 Evaluate how to agree action when tenderers withdraw from the process
	6.8 Explain how to implement action when tenderers withdraw from the process
7. Be able to assess and select successful tenderers and negotiate changes	7.1 Check with tenderers if any discrepancies, omissions and errors are found in the tenders, and make any amendments which tenderers authorise
	7.2 Evaluate the tenders and choose those that best meet the criteria and reject those that do not
	7.3 Check that the successful tenderer and the client can meet the obligations of the contract and recommend a preferred tenderer to the client
	7.4 Accept the successful tenderer formally and politely notify tenderers who have been unsuccessful, about the result
	7.5 Negotiate and agree any variations, adjustments and corrections with the successful tenderer and confirm them in writing, subject to contract
8. Understand how to assess and select successful tenderers and negotiate changes	8.1 Explain how to check with tenderers if any discrepancies, omissions and errors are found in the tenders and make any amendments which tenderers authorise
	8.2 Evaluate the tenders which are selected and choose the tender which best meets the criteria
	8.3 Explain how to check that the successful tenderer and the client can meet the obligations of the contract
	8.4 Propose how to recommend a preferred tenderer to the client
	8.5 Explain how to notify tenderers who have been unsuccessful, about the result
	8.6 Evaluate how to accept the successful tender formally



	8.7 Explain how to confirm any variations, adjustments and corrections in writing, subject to contact
	8.8 Propose how to negotiate any variations, adjustments and corrections with the successful tenderer
	8.9 Evaluate how to agree any variations, adjustments and corrections with the successful tenderer



## Unit 33: Manage project completion and handover guidance in conservation

Unit Reference Number: K/504/6876

Level: 6

Credit: 5

### Unit Summary

This Unit is about the recognition of what constitutes a handover package for the people receiving and working with the completed project. You will need to identify the relevant information and guidance documentation and be involved in the preparation of the package itself. You will need to have an understanding and knowledge of the process and the working of the project in order to provide the correct guidance for the operation and maintenance of the buildings, installations and systems.

You will need to appreciate that the information being provided may be used by personnel outside your own discipline who are possibly less informed than yourself. The format will have to be easily understood and in a format that will be durable in all conditions. This standard is about using evaluation techniques to decide whether the objectives of a project have been achieved. It includes making judgements about the project based on information collected and analysed to assess what went well and why. It is also about using the information to make changes and improvements, for example, to be more effective or efficient. It is also about instructing clients and users on the effective operations and maintenance of buildings, installations and systems.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to provide information and guidance to support future use and maintenance	1.1 Specify what information and guidance will be needed by the people who will use the buildings, installations and systems
	1.2 Record the most recent information produced during design, construction and installation, which can be used for guidance about operation and maintenance
	1.3 Produce guidance material on operation and maintenance which is logically structured, in a durable format and capable of interpretation by an informed lay user
	1.4 Provide technical information in the guidance which helps the client and users to identify limitations and to operate and maintain equipment, systems and services efficiently and without risk to health and safety
2. Understand how to provide information and guidance to support future use and maintenance	2.1 Explain how to provide technical information in the guidance which helps the client and users to identify limitations and to operate and maintain equipment, systems and services efficiently and without risk to health and safety
	2.2 Evaluate how to specify what information and guidance will be needed by the people who will use the buildings, installations and systems
	2.3 Explain how to record the most recent information produced during design, construction and installation, which can be used for guidance about operation and maintenance
	2.4 Explain how to produce guidance material on operation and maintenance



ABBE is a wholly owned subsidiary of Birmingham City University

3. Be able to manage project completion and handover guidance	3.1 Confirm project requirements, consult with stakeholders and develop and agree a commissioning programme
	3.2 Check that project requirements have been met and record outstanding work and defects
	3.3 Carry out commissioning inspections and tests that require certification and ensure that they are witnessed by stakeholders as required
	3.4 Identify and arrange for the satisfactory completion of any outstanding work
	3.5 Arrange a handover inspection involving all relevant stakeholders, confirm any stakeholder concerns that need to be addressed, and record and agree any required actions
	3.6 Check that stakeholders respective responsibilities are adopted
	3.7 Assemble and hand over buildings, installations and systems and operational documentation in accordance with the contract
	3.8 Instruct clients and users on the effective operation and maintenance of buildings, installations and systems
4. Understand how to manage project completion and handover guidance	4.1 Describe what to identify as the satisfactory completion of any outstanding work
	4.2 Explain how to confirm project requirements and consult with stakeholders
	4.3 Explain how to check that project requirements have been met and record outstanding work and defects
	4.4 Explain how to arrange for the satisfactory completion of any outstanding work
	4.5 Propose how to develop a commissioning programme
	4.6 Evaluate how to agree a commissioning programme
	4.7 Examine how to carry out commissioning inspections and tests that require certification and ensure that they are witnessed by stakeholders as required
	4.8 Explain how to arrange a handover inspection involving all relevant stakeholders, confirm any stakeholder concerns that need to be addressed and record any required actions
	4.9 Evaluate how to agree any required actions
	4.10 Explain how to check that stakeholders respective responsibilities are adopted
	4.11 Explain how to assemble and hand over buildings, installations and systems and operational documentation
	4.12 Explain how to instruct clients and users on the effective operation and maintenance of buildings, installations and systems



## Unit 34: Evaluate and resolve disputes in planning, conservation and building control

Unit Reference Number: M/504/6877

Level: 6

Credit: 6

### Unit Summary

This unit concerns the most effective way of settling a dispute. It involves gathering evidence and pursuing the case through to a satisfactory resolution. You will need to be able to summarise and assess the differing viewpoints and identify where additional information or expertise is required. You will need to recommend a process for dispute resolution and offer alternative approaches where the dispute is not valid. You will need to be able to identify and evaluate information relevant to a dispute. You will need to assess the advice received from experts and produce conclusions and recommendations. You will need to know the options available for resolving disputes and the correct procedures for dealing with them.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to evaluate potential implications for dispute resolution	1.1 Summarise the type and nature of the dispute and its legal context
	1.2 Assess the strengths and weaknesses of the case and assess the implications of proceeding
	1.3 Identify what expertise and support will be needed at different stages of the dispute and the implications of proceeding
	1.4 Identify potential options for dispute resolution which are based on relevant information and accurate assessments
	1.5 Identify potential responses to the options for dispute resolution and assess the risk involved
	1.6 Recommend a process for dispute resolution which is likely to be most acceptable to all the people involved and which meets legal requirements
	1.7 Specify, clearly, the process for dispute resolution which has been agreed and prepare written terms and conditions
	1.8 Advise against proceeding where the dispute is neither valid nor credible, and offer realistic advice on alternative approaches
2. Understand how to evaluate potential implications for dispute resolution	2.1 Explain how to summarise the type and nature of the dispute and its legal context
	2.2 Examine how to assess the strengths and weaknesses of the case
	2.3 Describe how to identify what expertise and support will be needed at different stages of the dispute and the implications of proceeding
	2.4 Describe how to identify potential options for dispute resolution
	2.5 Describe what to identify as potential responses to the options for dispute resolution
	2.6 Examine how to assess the risk involved in dispute resolution



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Propose how to recommend a process for dispute resolution
	2.8 Evaluate how to specify the process for dispute resolution which has been agreed and prepare written terms and conditions
	2.9 Propose how to advise against proceeding where the dispute is neither valid nor credible and offer realistic advice on alternative approaches
3. Be able to evaluate information relevant to dispute resolution	3.1 Identify available information which is relevant to the dispute, within the time limits, identify potentially incomplete or missing information
	3.2 Obtain enough additional information to make a valid evaluation
	3.3 Evaluate all the relevant information and summarise and justify it in a reasoned argument
	3.4 Assess the arguments and the advice received from experts, produce justifiable conclusions and recommendations for further action and pass this to the people involved in the dispute
	3.5 Disclose information which is relevant to the dispute only to those who have a right to see it
4. Understand how to evaluate information relevant to dispute resolution	4.1 Describe what to identify as information that is relevant to the dispute and potentially incomplete or missing information
	4.2 Explain how to obtain enough additional information to make a valid evaluation
	4.3 Evaluate and justify all the relevant information
	4.4 Explain how to summarise the relevant information
	4.5 Examine how to assess the arguments and the advice received from experts
	4.6 Explain how to produce justifiable conclusions and recommendations for further action and pass them to the people involved in the dispute
	4.7 Explain how to disclose information which is relevant to the dispute only to those who have a right to see it
5. Be able to negotiate and progress the resolution of a dispute	5.1 Prepare documents about the dispute which have a clear rationale, and which include valid supporting information
	5.2 Keep regular contact with the people involved in the dispute and investigating and proposing options and processes for settling the dispute, which are likely to be acceptable to them
	5.3 Review reactions and proposals from opposite parties and recommend a response
	5.4 Ask questions to test the consistency and resilience of the opposite party's position and to probe for possible movement
	5.5 Summarise and record points of agreement and disagreement
	5.6 Recommend acceptance of offers which are judged to be the best available
	5.7 Draft formal acceptance letters accurately and in a suitable style, and send them promptly to all parties
	5.8 Suggest realistic options and processes for settling the dispute when offers are not acceptable and assess the advantages and disadvantages of each alternative
6. Understand how to negotiate and progress	6.1 Explain how to prepare documents about the dispute
	6.2 Explain how to keep regular contact with the people involved in the dispute



the resolution of a dispute	6.3 Examine how to investigate options and processes for settling the dispute
	6.4 Propose how to propose options and processes for settling the dispute
	6.5 Propose how to suggest realistic options and processes for settling the dispute when offers are not acceptable
	6.6 Examine how to assess the advantages and disadvantages of each alternative
	6.7 Examine how to review reactions and proposals from opposite parties
	6.8 Explain how to ask questions to test the consistency and resilience of the opposite party's position and to probe for possible movement
	6.9 Explain how to summarise and record points of agreement and disagreement
	6.10 Explain how to send formal acceptance letters to all parties
	6.11 Propose how to recommend a response to reactions and proposals from opposite parties
	6.12 Propose how to recommend acceptance of offers which are judged to be the best available
	6.13 Evaluate how to draft formal acceptance letters



## Unit 35: Prepare and present evidence on disputes in planning, conservation and building control

Unit Reference Number: T/504/6878

Level: 6

Credit: 6

### Unit Summary

This unit concerns investigating information relevant to a dispute. It also involves preparing and presenting evidence in cases involving disputes. You will need to gather and collate relevant evidence, including examples from similar cases and precedents. You will need to prepare and present written submissions. You will need to be able to present a case to a legally constituted body.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to prepare evidence for submission	1.1 Investigate sources of information that are relevant to the dispute and summarise valid and reliable information which supports the case
	1.2 Interview people involved in the dispute and witnesses using a questioning style which encourages honest and accurate responses
	1.3 Advise people involved in the dispute and witnesses on the procedures, appropriate responses and their roles in hearings, interviews and legal proceedings
	1.4 Develop a presentation strategy, which is most likely to be successful, and agree the strategy with people involved in the dispute and witnesses
	1.5 Assess documents for relevance, confirm that they are valid and summarise them accurately
	1.6 Examine existing cases and precedents, select relevant examples and include them into the background materials and evaluation criteria
	1.7 Consult with specialists by providing them with accurate summary information in cases where more information and expertise is needed
	1.8 Produce case materials which are complete and contain valid, reliable and accurate information
	1.9 Follow agreed procedures and meet time limits for submitting written materials and responses
	1.10 Prepare written submissions which are accurate, contain valid and relevant information and follow reasoned arguments which present the case in the most favourable manner
2. Understand how to prepare evidence for submission	2.1 Explain how to summarise documents and confirm that they are valid
	2.2 Explain how to include relevant examples from existing cases and precedents into the background materials and evaluation criteria
	2.3 Examine how to assess documents for relevance



ABBE is a wholly owned subsidiary of Birmingham City University

	2.4 Examine how to examine existing cases and precedents
	2.5 Evaluate how to select relevant examples from existing cases and precedents
	2.6 Explain how to summarise valid and reliable information which supports the case
	2.7 Explain how to produce case materials
	2.8 How to follow agreed procedures and meet time limits for submitting written materials and responses
	2.9 Explain how to prepare written submissions
	2.10 Examine how to investigate sources of information that are relevant to the dispute
	2.11 Examine how to interview people involved in the dispute and witnesses
	2.12 Propose how to develop a presentation strategy
	2.13 Propose how to advise people involved in the dispute and witnesses on the procedures, appropriate responses and their roles in hearings, interviews and legal proceedings
	2.14 Evaluate how to agree a presentation strategy with people involved in the dispute and witnesses
	2.15 Explain how to consult with specialists
3. Be able to present evidence to legally constituted adjudicating bodies	3.1 Make presentations relating to the dispute which are complete, accurate, clear, concise and objective, using a pace, style and manner which are appropriate to the level of formality of the hearing and maintain the goodwill and trust of all the people involved
	3.2 Present the case clearly and concisely, identify the relevant points of the supporting argument and avoid any additional information and opinions which are not directly relevant to the case
	3.3 Respond to presentations and ask questions which are designed to present and interpret the evidence in the best interests of the case
	3.4 Respond to questions on presentations in a way which presents and interprets the evidence in the best interests of the case
	3.5 Present final summaries which identify the relevant points of the supporting argument and the major weaknesses in the opposing submission
	3.6 Assess the results following a formal case presentation, and identify key issues which are likely to be relevant in any further action
	3.7 Recommend appropriate further action to settle the dispute where cases are unsuccessful
4. Understand how to present evidence to legally constituted adjudicating bodies	4.1 Explain how to make presentations relating to the dispute
	4.2 Explain how to present the case and avoid presenting any additional information and opinions which are not directly relevant to the case
	4.3 Explain how to present final summaries which identify the supporting argument and weaknesses in the opposing submission
	4.4 Describe how to identify the relevant points of the supporting argument



	4.5 Explain how to respond to presentations and ask questions which are designed to present and interpret the evidence in the best interests of the case
	4.6 Explain how to respond to questions on presentations
	4.7 Describe what to identify as key issues which are likely to be relevant in any further action
	4.8 Examine how to assess the results following a formal case presentation
	4.9 Propose how to recommend appropriate further action to settle the dispute where cases are unsuccessful



**\*\*This unit is mandatory in Condition, but is optional in the Culture Pathway**

**Unit 36: Survey, assess and record the condition of assets in conservation**

Unit Reference Number: A/504/6879

Level: 6

Credit: 6

**Unit Summary**

This unit concerns the surveying the condition of heritage asset(s). It covers the preparation phase, the completion of the survey and recording the results. You will need to recommend the appropriate way of carrying out the condition survey and agree it with interested parties. This involves evaluating existing information and identifying significant factors and selecting appropriate methods and techniques. You will need to observe, measure and record aspects of the asset(s) in relation to actual and potential causes of failure and decay. This will enable you to assess the condition of the asset(s). You will need to be able to summarise the findings of a property condition survey and make recommendations based upon it. You will need to answer clients' questions and provide clarification.

**Assessment Guidance**

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to agree asset condition	1.1 Identify and confirm the asset which require to be inspected
	1.2 Identify the objectives, purpose and approach of the condition survey and collate available information and documents
	1.3 Ensure risk assessment is carried out to determine safe working practices
	1.4 Select valid, accurate and relevant information for the condition survey process
	1.5 Evaluate relevant existing information and advice and identify significant factors which may influence the condition survey approach
	1.6 Identify and confirm the levels and types of technical professional specialist support which will be needed and brief them with clear and accurate summaries of the relevant information available and the survey objectives and purpose
	1.7 Select methods and techniques for the chosen approach and condition survey which meet the requirements of relevant codes of practice and legislation
	1.8 Recommend a condition survey process which is justified by the evaluation, present it clearly and explain it to the stakeholders
	1.9 Assess the validity of technical and professional and specialist support included in the recommendation
	1.10 Agree and confirm the client's instructions, permissions and rights of access for the condition survey before work starts
2. Understand how to agree asset condition	2.1 Describe what to identify as the asset which requires to be inspected
	2.2 Describe what to identify as the objectives, purpose and approach of the condition survey



ABBE is a wholly owned subsidiary of Birmingham City University

	2.3 Explain how to ensure that risk assessment is carried out to determine safe working practices
	2.4 Explain how to collate available information and document
	2.5 Evaluate how to select valid, accurate and relevant information for the condition and/or survey process
	2.6 Evaluate relevant information and advice
	2.7 Describe what to identify as significant factors which may influence the condition and/or survey approach
	2.8 Explain how to confirm the levels and types of technical and professional and specialist support which will be needed
	2.9 Describe what to identify as the levels and types of technical and professional and specialist support which will be needed
	2.10 Explain how to brief technical and professional and specialist support with clear and accurate summaries of the information available and the survey objectives and purpose
	2.11 Evaluate how to select methods and techniques for the chosen approach and condition and/or survey
	2.12 Propose how to recommend a condition survey process
	2.13 Explain how to present and explain the condition survey process to the stakeholder
	2.14 Examine how to assess the validity of technical and professional and specialist support included in the recommendations
	2.15 Explain how to confirm the client's instructions, permissions and rights of access for the condition and/or survey before work starts
	2.16 Evaluate how to agree the instructions and agreements for the condition and/or survey before work starts
3. Be able to inspect assets for condition	3.1 Evaluate existing available data and permissions, confirm the objectives, purpose and approach of the inspection and obtain the equipment and resources and specialist advice that will be needed
	3.2 Manage risk assessment and safe working practices in relation to inspections
	3.3 Take accurate observations, records and measurements of aspects of the asset which are necessary for the inspection
	3.4 Examine actual and potential causes of failure deterioration and decay and assess conditions
	3.5 Identify gaps in information and obtain and evaluate additional data needed
	3.6 Make further investigations when observations are inconsistent with existing data and findings, and accurately identify the cause of inconsistencies
	3.7 State clearly the authority for assumptions and projections used in the report and indicate any instances where and why accurate inspection and measurement has not been possible
	3.8 Identify and obtain specialist advice where complex issues are found
	3.9 Record observations and measurements clearly, accurately and completely using agreed formats and conventions
4. Understand how to inspect assets for condition	4.1 Evaluate existing available data and permissions
	4.2 Explain how to confirm that the objectives, purpose and approach of the inspection
	4.3 Explain how to obtain the equipment and resources and specialist advice that will be needed



ABBE is a wholly owned subsidiary of Birmingham City University

	4.4 Evaluate how to manage risk assessment and safe working practices in relation to inspections
	4.5 Explain how to take accurate observations and measurements of aspects of the asset which are necessary for the inspection
	4.6 Examine how to examine actual and potential causes of failure and deterioration and assess condition
	4.7 Evaluate how to evaluate additional data needed
	4.8 Explain how to obtain additional data needed
	4.9 Explain how to state clearly instances where and why accurate inspection and measurement has not been possible
	4.10 Describe what to identify as gaps in information
	4.11 Examine how to make further investigations when observations are inconsistent with existing data and expected findings
	4.12 Describe what to identify as specialist advice
	4.13 Describe what to identify as the cause of inconsistencies with existing data
	4.14 Explain how to obtain specialist advice where complex issues are found
	4.15 Explain how to record observations and measurements clearly, accurately and completely using agreed formats and conventions
5. Be able to prepare and submit asset survey reports and records	5.1 Assemble and collate information on the objectives, purpose and approach of the condition survey
	5.2 Analyse all relevant evidence and information using appropriate methods and techniques and make a realistic assessment of condition
	5.3 Analyse and identify the implications and consequences of the decay
	5.4 Prepare and submit a condition survey report which is accurate, contains all relevant information and describes aspects of the asset
	5.5 Present findings and conclusions in formats that are suitable for circulation and discussion by non-specialists
	5.6 Answer the client's questions about the condition survey and give appropriate clarification and justification
	5.7 Archive records which are clear, accurate and complete and conform to accepted professional and statutory requirements
6. Understand how to prepare and submit asset survey reports and records	6.1 Explain how to assemble and collate information on the objectives, purpose and approach of the from the condition survey
	6.2 Examine how to analyse all relevant evidence and information using appropriate methods and techniques
	6.3 Examine how to make a realistic assessment of condition
	6.4 Examine how to analyse the implications and consequences of the decay
	6.5 Describe what to identify as the implications and consequences of the decay
	6.6 Explain how to prepare and submit a condition survey report
	6.7 Explain how to present findings and conclusions in formats that are suitable for circulation and discussion by non-specialists
	6.8 Explain how to answer the clients question about the condition survey and give appropriate clarification



	6.9 Explain how to archive records which are clear, accurate and complete and conform to accepted professional and statutory requirements
--	---



ABBE is a wholly owned subsidiary of Birmingham City University

## Unit 37: Monitor and control property and asset(s) use in conservation

Unit Reference Number: M/504/6880

Level: 6

Credit: 5

### Unit Summary

This unit is about managing the use of an historical and heritage asset and its facilities by developing and implementing monitoring controls. By gathering and analysing feedback you will be able to monitor any changing circumstances and recommend changes in use which will improve the efficiency of use and the return on investment. You will also need to arrange inspections to obtain the required certificates and approvals relating to the use of the asset(s) and report the results to the people who have an interest. You are also required to review contractual terms and conditions regularly and to take prompt corrective action when they are not being met.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to monitor and control property and asset(s) use in conservation	1.1 Develop and implement in line with the organisational objectives and approach, suitable monitoring controls and review them regularly to check that they are operating effectively
	1.2 Monitor changing circumstances that affect the use of property and asset and their facilities by gathering feedback from the people involved
	1.3 Take corrective action if the property and asset is not being used as intended and report the matter to decision makers
	1.4 Analyse feedback on the use of property and asset and their facilities and recommend changes in use which will improve the efficiency of use and return on the investment
	1.5 Obtain insurance cover which meets statutory and legal requirements, is appropriate to the type of use and which balances the cost, the value of the property and asset and the degree of risk
	1.6 Arrange inspections to obtain the required certificates and approvals relating to the use of property and asset and report the results to the people who have an interest
	1.7 Review the contractual terms and conditions regularly and take prompt corrective action when they are not being met
	1.8 Deal with all the influencing factors involved in a manner which promotes goodwill and trust
2. Understand how to monitor and control property and asset(s) use in conservation	2.1 Explain how to implement suitable monitor controls
	2.2 Examine how to review monitoring controls
	2.3 Propose how to develop suitable monitoring controls
	2.4 Propose how to recommend changes in use which will improve the efficiency of the use and return on investment



ABBE is a wholly owned subsidiary of Birmingham City University

	2.5 Explain how to obtain insurance cover
	2.6 Explain how to arrange inspections to obtain the required certificates and approvals relating to the use of property and asset and report the inspection results to the people who have an interest
	2.7 Examine how to analyse feedback on the use of property and asset and their facilities
	2.8 Explain how to deal with all the influencing factors involved in a manner which promotes goodwill and trust
	2.9 Examine how to monitor the changing circumstances that affect the use of property and asset and their facilities by gathering feedback from the people involved
	2.10 Explain how to take corrective action, and report the matter to decision makers if the property and asset is not being used as intended
	2.11 Explain how to take prompt corrective action when the contractual terms and conditions are not being met
	2.12 Examine how to review the contractual terms and conditions regularly



## Unit 38: Establish, implement and maintain administrative services in conservation and building control

Unit Reference Number: A/504/6882

Level: 5

Credit: 4

### Unit Summary

This unit is about establishing systems for the implementation of policies, operations and legislation. You will need to identify objectives for the implementation of policies, operations and procedures. You will need to assess resources, confirm people's roles and briefs and set realistic time limits to achieve objectives. You will also need to set up and implement methods of working which take into consideration any relevant constraints and factors. You will need to evaluate methods of working chosen to implement policies, operations and legislation. You will also need to identify areas that require improvement and evaluate and select methods for improvement and recommend them to decision makers. You will also need to monitor and review procedures regularly.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to establish and implement administrative procedures	1.1 Establish systems for the implementation of policies, operations and legislation
	1.2 Identify the constraints and factors which will influence the sequence of operations, and assess the influence they are likely to have
	1.3 Review the systems in the light of available resources and report on any consequent issues
	1.4 Confirm peoples' roles and responsibilities and brief them and set realistic time limits for them to achieve their objectives
	1.5 Implement effective methods of working to encourage the integration of all those involved taking into account all the relevant constraints and factors
2. Understand how to establish and implement administrative procedures	2.1 Propose how to establish systems for the implementation of policies, operations and legislation
	2.2 Describe what to identify as the constraints and factors which will influence the sequence of operations
	2.3 Examine how to assess the likely influence of constraints and factors
	2.4 Examine how to review the systems in the light of available resources and report on any consequent issues
	2.5 Explain how to confirm peoples' roles and responsibilities
	2.6 Explain how to brief people on their roles and responsibilities
	2.7 Explain how to implement effective methods of working to encourage the integration of all those involved
	2.8 Explain how to take into account all the relevant constraints and factors



ABBE is a wholly owned subsidiary of Birmingham City University

	2.9 Explain how to set realistic time limits for people to achieve their objectives
3. Be able to maintain effective administrative services	3.1 Evaluate the methods of working used to implement policies, operations and legislation
	3.2 Identify areas where improvements are needed
	3.3 Evaluate different methods for improvement and consult with stakeholders on the options
	3.4 Select methods for improvement which are the most suitable and recommend them to decision makers
	3.5 Review procedures regularly to ensure that their effectiveness is maintained
4. Understand how to maintain effective administrative services	4.1 Evaluate the methods of working used to implement policies, operations and legislation
	4.2 Describe how to identify areas where improvements are needed
	4.3 Evaluate how to evaluate different methods for improvement
	4.4 Explain how to consult on the options with stakeholders
	4.5 Evaluate how to select methods for improvement
	4.6 Propose how to recommend methods for improvement to decision makers
	4.7 Examine how to review procedures



## Unit 39: Define, implement and manage information systems in planning, conservation and building control

Unit Reference Number: F/504/6883

Level: 5

Credit: 3

### Unit Summary

This unit concerns the running and management of all kinds of information systems ranging from a simple filing system to a complex computer-based system. You will need to be able to evaluate and agree the requirements for information systems. It involves defining and agreeing the procedures for maintaining the information in them. You will need to control the use of an information system in a way that protects and maintains the quality of the data. You will also need to be able to access and order the data in a way that is helpful to users.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to define and implement information systems	1.1 Define and evaluate the requirements for information systems
	1.2 Agree the most suitable system through discussions with senior managers and system users and specify the operations and functions
	1.3 Define and agree valid procedures for obtaining, selecting, classifying and recording information
	1.4 Assess the relevance of information and classify the relevant information using the agreed system
	1.5 Record information accurately and store it using the agreed procedures
	1.6 Define and agree methods for control and access which make the best use of the information system and which maintain confidentiality
2. Understand how to define and implement information systems	2.1 Evaluate how to define and evaluate the requirements for information systems
	2.2 Evaluate how to agree the most suitable information system
	2.3 Explain how to record information
	2.4 Evaluate how to specify the operations and functions of the information system
	2.5 Explain how to classify the relevant information using the agreed system
	2.6 Examine how to assess the relevance of information
	2.7 Evaluate how to define and agree valid procedures for obtaining, selecting, classifying and recording information
	2.8 Explain how to store information
	2.9 Evaluate how to define and agree methods for control and access which make the best use of the information system and which maintain confidentiality



ABBE is a wholly owned subsidiary of Birmingham City University

3. Be able to manage information systems	3.1 Collate information and organise it into a suitable form for use
	3.2 Classify stored information so that it can be quickly identified and retrieved when needed
	3.3 Advise and offer guidance to people who are unable to find the information they need and suggesting alternative sources
	3.4 Control the use of the information system by using procedures which have been agreed so that the information system remains reliable and useful
	3.5 Update information, removing information which is not needed and archive redundant information
	3.6 Identify, summarise and disseminate information which might be of use to others
4. Understand how to manage information systems	4.1 Describe what to identify as information which might be of use to others
	4.2 Explain how to collate information
	4.3 Explain how to update information, removing information which is not needed and archiving redundant information
	4.4 Propose how to advise and offer guidance to people who are unable to find the information they need, and suggest alternative sources of information
	4.5 Explain how to summarise and disseminate information which might be of use to others
	4.6 Propose how to organise information into a suitable form for use
	4.7 Explain how to classify stored information for identification and retrieval
	4.8 Evaluate how to control the use of the information system



## Unit 40: Develop and maintain working relationships in planning, conservation and building control

Unit Reference Number: J/504/6884

Level: 5

Credit: 3

### Unit Summary

This unit is about developing effective working relationships internally and externally. You will need to demonstrate how you can act to promote goodwill and how you keep others informed of your work, presenting recommendations where appropriate.

### Assessment Guidance

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

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Be able to develop and maintain working relationships in planning, conservation and building control	1.1 Develop, maintain and encourage working relationships with people which promote goodwill, trust and understanding
	1.2 Inform people about work activities in an appropriate level of detail and in a timely manner
	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 Resolve differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding
2. Understand how to develop and maintain working relationships in planning, conservation and building control	2.1 Explain how to maintain and encourage working relationships with people that promote goodwill, trust and understanding
	2.2 Propose how to working relationships with people that promote goodwill, trust and understanding
	2.3 Propose how to resolve differences of opinion in ways which minimise offence, and which promote goodwill, trust and understanding
	2.4 Explain how to encourage questions, requests for clarification and comments
	2.5 Explain how to present proposals for action to people
	2.6 Explain how to clarify with people objections to proposals



ABBE is a wholly owned subsidiary of Birmingham City University

	2.7 Propose how to suggest alternative proposals where objections have been raised in respect of existing proposals
	2.8 Explain how to inform people about work activities in an appropriate level of detail in a timely manner
	2.9 Propose how to offer advice and help to people about work activities

**\*\*\*NB: Some of these units may also appear in the Level 6 NVQ Diploma in Town Planning and/or Level 6 NVQ Diploma in Building Control**



ABBE is a wholly owned subsidiary of Birmingham City University



**Head Office Address:**

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

**Contact:**

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



ABBE is a wholly owned subsidiary of Birmingham City University