

# COSCCOO21 (SQA Unit Code - HA48 04)

## Prepare proposals and obtain feedback for the provision of products and services in construction



### Overview

This unit is about agreeing proposals for the provision of the products and services. You will need to produce a report summarising the design parameters covering design, planning, timetable, scheduling, costs, delivery and any specifics relative to the provision of the products and services.

You will need to liaise on the presentation of the design aspects with a specialist design team and others associated with the detailed development and construction of products and services

You will need to identify changes to customer requirements. You will need to present initial proposals to the customer, negotiate and discuss agreed changes and record decisions.

### Performance criteria

*You must be able to:*

#### Prepare and present proposal for the provision of products and services

- P1 take into account and assess all information gained in establishing the design **parameters** for the provision of products and services
- P2 select and analyse relevant and valid data and confirming its status using **appropriate methods** and **selection criteria**
- P3 identify and develop design options to meet agreed design **parameters**
- P4 evaluate and select the most appropriate methods and techniques of presentation for communicating the design proposals
- P5 present the recommendations, proposals and design options using the selected methods and techniques
- P6 identify valid alternative options where the **design** options do not meet all customer require
- P7 estimate and confirm projected product and service costs and related financial data
- P8 obtain clear statements of agreement and position from **interested parties**
- P9 produce a clear and unambiguous document summarising the **parameters** within an agreed timescale, and **present** it to **interested parties**

#### Review and finalise proposals for the provision of products and services

*You must be able to:*

- P10 **present** initial proposals to and discuss them with the customer, and raise and record significant points
- P11 discuss and clarify significant constraints, opportunities and areas of uncertainty within the proposals with **interested parties**
- P12 make appropriate modifications to the initial proposals to reflect the outcome of discussions with **interested parties**
- P13 negotiate a clear and mutually acceptable agreement with **interested parties** with sufficient detail to allow work to proceed to the next stage
- P14 discuss provisions for subsequent changes fully with **interested parties**, explain their implications, and record agreed discussions

#### Obtain and evaluate feedback information

*You must be able to:*

- P15 identify and agree valid and reliable **methods and sources** for obtaining **feedback** on completed projects
- P16 promote the value of obtaining and using **feedback data** and encourage and enlist the cooperation of **interested parties** in obtaining **feedback**
- P17 identify areas of interest and agree them with **interested parties**
- P18 identify, obtain and investigate available **feedback data** from relevant sources and assess it for its implications and potential future use

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### Performance criteria

- P19 review the **feedback data** matching it against the original requirements and objectives and summarise any shortcomings
- P20 identify and recommend to **interested parties** potential improvements arising from **feedback**
- P21 record and classify improvements, incorporate them into procedures and **data bases**, and promote them for future use

### Knowledge and understanding

*You need to know and understand:*

#### Prepare and present proposal for the provision of products and services

- K1 how and why to take into account and assess all the information gained in establishing the design **parameters** (synthesis)
- K2 how and why to select data which is relevant and valid (evaluation)
- K3 how and why to analyse data and confirm its status using **appropriate methods** and **selection criteria** (analysis)
- K4 what to identify as design options to meet agreed design **parameters** (understanding)
- K5 how and why to develop design options to meet agreed design **parameters** (synthesis)
- K6 how and why to evaluate and select the most appropriate methods and techniques of presentation for communicating the design proposals (evaluation)
- K7 how to present the recommendations, proposals and design options using the selected methods and techniques (application)
- K8 what to identify as valid alternative options where the **design** options do not meet all customer require (understanding)
- K9 how and why to estimate and confirm projected product and service costs and related financial data (synthesis)
- K10 how to obtain clear statements of agreement and position for **interested parties** (application)
- K11 how and why to produce a document summarising the design **parameters** within an agreed timescale (synthesis)
- K12 how to **present** the document to **interested parties** (application)

#### Review and finalise proposals for the provision of products and services

*You need to know and understand:*

- K13 how to **present** initial proposals to the customer (application)
- K14 how to discuss proposals with the customer (synthesis)
- K15 how to raise and record significant points with the customer (application)
- K16 how to discuss significant constraints, opportunities and areas of uncertainty within the proposals with **interested parties** (synthesis)
- K17 how and why to clarify significant constraints, opportunities and areas of uncertainty within the proposals with **interested parties** (synthesis)
- K18 how and why to make appropriate modifications to the initial proposals to reflect the outcome of discussions with **interested parties** (synthesis)
- K19 how and why to negotiate a clear and mutually acceptable agreement with **interested parties** with sufficient detail to allow work to proceed to the next stage (synthesis)

### Knowledge and understanding

- K20 how and why to discuss provisions for subsequent changes fully with **interested parties** (synthesis)
- K21 how to explain the implications for subsequent changes fully with **interested parties** (application)
- K22 how to record agreed discussions (application)

### Obtain and evaluate feedback information

#### *You need to know and understand:*

- K23 what to identify valid and reliable **methods and sources** for obtaining **feedback** on completed projects (understanding)
- K24 how and why to agree valid and reliable **methods and sources** for obtaining **feedback** on completed projects (synthesis)
- K25 how to promote the value of obtaining and using **feedback** data and encouraging and enlisting the cooperation of **interested parties** in obtaining **feedback** (application)
- K26 how to identify areas of interest and agree them with **interested parties** (application)
- K27 how and why to agree areas of interest with **interested parties** (evaluation)
- K28 how and why to identify, obtain and investigate available **feedback data** from relevant sources (synthesis)
- K29 how to review the **feedback data** matching it against the original requirements and objectives and summarising any shortcomings (analysis)
- K30 how to match **feedback data** against the original requirements and objectives and summarise any shortcomings (application)
- K31 how to record and classify improvements incorporating them into procedures and **data bases** and promoting them for future use (application)

### Scope/range

### Prepare and present proposal for the provision of products and services

- 1 Parameters
  - 1.1 customer requirements
  - 1.2 procurement factors
  - 1.3 physical factors
  - 1.4 resource factors
- 2 Appropriate methods
  - 2.1 comparison with similar projects
  - 2.2 standard checklists
  - 2.3 reference to comparative research
- 3 Selection Criteria:
  - 3.1 critical design parameters
  - 3.2 project scope
  - 3.3 validity of data
- 4 Modes of design presentation:
  - 4.1 sketches
  - 4.2 drawings
  - 4.3 models
  - 4.4 computer generated data
  - 4.5 photomontage
  - 4.6 written reports
- 5 Methods and techniques of presentation:
  - 5.1 documentary
  - 5.2 comparative studies with similar projects
  - 5.3 presentations
  - 5.4 computer modelled simulations
- 6 Interested parties:
  - 6.1 customers
  - 6.2 design consultants and advisors
  - 6.3 potential contractors
  - 6.4 potential subcontractors and suppliers
  - 6.5 regulatory authorities
- 7 Present:

### Scope/range

- 7.1 oral
- 7.2 written
- 7.3 graphical
- 7.4 photographs
- 7.5 models
- 7.6 exhibitions

### Review and finalise proposals for the provision of products and services

- 8 Present:
  - 8.1 orally
  - 8.2 in writing
  - 8.3 graphically
  - 8.4 photographs
  - 8.5 models
  - 8.6 exhibitions
- 9 Interested parties:
  - 9.1 customers
  - 9.2 design consultants and advisors
  - 9.3 potential contractors
  - 9.4 potential subcontractors and suppliers
  - 9.5 regulatory authorities

### Obtain and evaluate feedback information

- 10 Methods and sources:
  - 10.1 project records and documentation
  - 10.2 site inspections and meetings
  - 10.3 research and performance data
- 11 Feedback:
  - 11.1 management procedures and records
  - 11.2 customer communications
  - 11.3 working arrangements
  - 11.4 formal and informal arrangements
- 12 Interested parties:
  - 12.1 customer

### Scope/range

- 12.2 design team
- 12.3 specialist consultants
- 12.4 contractors
- 12.5 sub-contractors and suppliers
- 13 Feedback data:
  - 13.1 approved providers
  - 13.2 contract documentation
  - 13.3 product information
  - 13.4 government and statutory publications
  - 13.5 reports
  - 13.6 organisational documentation
- 14 Databases:
  - 14.1 files and records
  - 14.2 library
  - 14.3 standard drawings
  - 14.4 specifications



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**Relevant occupations** Building and civil engineering technicians; managers in construction; estimators; valuers and assessors managers; quantity surveyors

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**Suite** ConstructionSkills

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