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## Overview

This unit is about the use and value of surveys in investigating development opportunities. It is about deciding what your survey/investigation is for, what information you need and how it will be collected, analysed and presented.

You must be able to identify a clear rationale for the survey/investigation, the required data and show how this data will be collected, either from historical existing information or from a commissioned survey.

It is about identifying data sources and evaluating that data as part of an investigation of development factors. You must be able to collect the data that you need and show how the data is analysed and evaluated. You will also be required to show how you consult appropriate professionals and investigating existing solutions and circumstances.

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### Performance criteria

#### Identify survey and investigation requirements

*You must be able to:*

- P1 identify the factors for survey and investigation which may be significant for the planned development
- P2 analyse and assess how accurate, up to date and complete the existing information is, and decide what additional information is needed
- P3 identify what data is needed its source, how accurate the data needs to be and what data outputs are required from surveys and investigations
- P4 make a preliminary investigation to identify any access problems and equipment which will be needed, and assess the implications for the measured survey
- P5 develop a clear and accurate method statement, a programme and a budget for the survey and agree them with the stakeholders
- P6 commission measured surveys by selecting people and organisations who are competent to do the work

#### Investigate and evaluate development factors, likely problems and potential solutions

*You must be able to:*

- P7 choose methods and techniques for the survey and investigation which are valid, reliable, consistent with legal requirements and which recognise concerns raised by the public
- P8 identify sources of information and collect and collate relevant data
- P9 accurately analyse and evaluate the investigation data which has been collected about all of the significant trends and factors affecting the project development
- P10 consult with experts on specific problems which are relevant to the investigation by providing them with an accurate summary of the problems
- P11 identify and accurately record the opportunities and constraints for project development options

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- P12 identify and assess previous solutions which are similar to the current circumstances to see whether they are relevant and useful
- P13 present accurate findings which are unambiguous, which clearly describe all the important factors, and which detail the implications for each development option, and in a format which is suitable for circulation and discussion with stakeholders
- P14 state clearly the authority for assumptions and projections used in the report
- P15 assemble any supporting data which is relevant to the study, but which is not included in the report, storing it safely and index it clearly for future reference

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### Knowledge and understanding

*You need to know and understand:*

#### Identify survey and investigation requirements

- K1 what to identify as the factors for survey and investigation which may be significant for the planned development (understanding)
- K2 how and why to analyse and assess how accurate, up to date and complete the existing information is (analysis)
- K3 how and why to decide what additional information is needed (evaluation)
- K4 what to identify as data that is needed, its source, how accurate the data needs to be and what data outputs are required from the survey (understanding)
- K5 how and why to make a preliminary investigation to identify any access problems and equipment which will be needed and assess the implications for the survey (analysis)
- K6 how and why to develop a clear and accurate method statement, a programme and a budget for the survey (synthesis)
- K7 how and why to agree a clear and accurate method statement, a programme and a budget for the survey with the stakeholders (evaluation)
- K8 how and why to commission surveys (evaluation)

#### Investigate and evaluate development factors, likely problems and potential solutions

*You need to know and understand:*

- K9 how to choose methods and techniques for the survey and investigation (evaluation)
- K10 what to identify as sources of information (understanding)
- K11 how to collect and collate relevant data (application)
- K12 how and why to analyse the investigation data which has been collected about all of the significant trends and factors affecting the project development (analysis)
- K13 how and why to evaluate the investigation data which has been collected about all of the significant trends and factors affecting the project development (evaluation)

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- K14 how to consult with experts (application)
- K15 what to identify as opportunities and constraints for project development options (understanding)
- K16 how to record the opportunities and constraints for project development options (application)
- K17 what to identify as previous solutions (understanding)
- K18 how and why to assess previous solutions which may be relevant to the current circumstances to see whether they are relevant and useful (analysis)
- K19 how to present findings (application)
- K20 how to state the authority for assumptions and projections used in the report (application)
- K21 how to assemble any supporting data which is relevant to the study, but which is not included in the report, storing it safely and index it clearly for future reference (application)

### Additional Information

#### Scope/range

#### Identify survey and investigation requirements

##### 1. Factors:

- 1.1. historical
- 1.2. conservation
- 1.3. social
- 1.4. visual and spatial
- 1.5. ecological and environmental
- 1.6. construction

##### 2. Survey and investigation:

- 2.1. visual
- 2.2. measured
- 2.3. documentary and record search
- 2.4. investigative research
- 2.5. field research

##### 3. Existing information:

- 3.1. photographs (including aerial photographs)
- 3.2. maps
- 3.3. charts
- 3.4. drawings
- 3.5. surveys
- 3.6. archive records
- 3.7. legal documents

##### 4. Sources:

- 4.1. client records
- 4.2. tenants
- 4.3. site owners
- 4.4. site managers
- 4.5. previous owners
- 4.6. local authorities
- 4.7. statutory authorities
- 4.8. public utilities
- 4.9. government departments
- 4.10. public and specialist libraries and archives

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### **Investigate and evaluate development factors, likely problems and potential solutions**

#### **5. Survey and investigation:**

- 5.1. visual
- 5.2. measured
- 5.3. documentary and record search
- 5.4. investigative research
- 5.5. field research

#### **6. Sources:**

- 6.1. client records
- 6.2. tenants
- 6.3. site owners
- 6.4. site managers
- 6.5. previous owners
- 6.6. local authorities
- 6.7. statutory authorities
- 6.8. public utilities
- 6.9. government departments
- 6.10. public and specialist libraries and archives

#### **7. Data:**

- 7.1. photographs
- 7.2. maps
- 7.3. charts
- 7.4. drawings
- 7.5. archive records
- 7.6. legal documents
- 7.7. surveys

#### **8. Factors:**

- 8.1. historical
- 8.2. conservation
- 8.3. social
- 8.4. visual and spatial
- 8.5. ecological and environmental
- 8.6. construction

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### **9. Opportunities and constraints:**

- 9.1. project type, purpose, location
- 9.2. durability
- 9.3. occupancy
- 9.4. significance/status
- 9.5. legal and regulatory constraints
- 9.6. physical and technical constraints
- 9.7. health and safety
- 9.8. anticipated development timetable
- 9.9. environmental quality and sustainability
- 9.10. standardisation

### **10. Present:**

- 10.1. orally
- 10.2. in writing
- 10.3. graphically
- 10.4. electronically

### **11. Stakeholders:**

- 11.1. client
- 11.2. owners
- 11.3. occupiers
- 11.4. community and special interest groups
- 11.5. planning authorities
- 11.6. regulatory authorities



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### Investigate development factors and solutions in built environment design management

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**Relevant occupations** Architects; Civil Engineers; Graphic Designers; Architectural Technologists; Town Planning Technicians; Building Surveyors

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**Suite** Built Environment Design Management

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