

# COSCSMO03 SQA Unit Code H99G 04

## Provide advice, judgement and service ethically in construction management



### Overview

This unit is about obtaining and evaluating information which is sufficiently detailed for the purpose and presenting it in an appropriate manner. You will be able to present clear, accurate and valid technical recommendations, judgement and service ethically.

Following recognised good practice you will need to make ethical judgements and offer advice which balances the needs of the organisation, its clients and society.

You will need to make judgements and offer advice which balances the needs of the client, the resources available and the needs of the people in the community, which identifies ethical standards (including health, safety and welfare) and any conflicts of interest.

You should identify where complex, indeterminate situations exist. You will need to assess the validity and completeness of the available information and analyse it and draw valid and justifiable conclusions.

You should reflect on the conclusions and interpret them into detailed issues that enable known opportunities and solutions to be identified and utilised for establishing policy.

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### Performance criteria

*You must be able to:*

#### Exchange information and present advice on technical issues

- P1 obtain and evaluate information which is sufficiently detailed for the **purpose**
- P2 **present** technical information and advice which is complete, summarised accurately and relevant to technical issues
- P3 **present technical recommendations and judgements** which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available
- P4 give technical instructions and guidance which are likely to be understood by the people who will follow them
- P5 **present technical recommendations and judgements** using a style of communication which is appropriate to the **people receiving information and advice**
- P6 adapt and modify the **presentation of technical recommendations and judgements** where people have difficulties understanding them

#### Resolve complex indeterminate situations

*You must be able to:*

- P7 identify where complex indeterminate situations exist estimate their effects realistically and summarise the issues for the organisation
- P8 assess the validity and completeness of the **information** available and identify any significant gaps
- P9 specify and obtain sufficient additional **information** to cover any gaps and to provide a valid starting point for the analysis of the situation
- P10 analyse **information** and draw valid and justifiable conclusions
- P11 apply decision making techniques which increase the reliability of the conclusions
- P12 **reflect** on the conclusions and interpret them into detailed issues that enable known opportunities and solutions to be identified and utilised for establishing policy

#### Practice within an ethical framework

*You must be able to:*

- P13 make judgements and offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
- P14 take clear and unequivocal personal responsibility for your own decisions and the decisions of others in your organisation
- P15 behave in an ethical manner and take appropriate action if unethical behaviour is brought to your attention
- P16 establish a system of communication to report instances of unethical behaviour which encourages responsibility and empowerment at all levels

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- P17 offer judgements and advice which recognise the needs of other people
- P18 manage criteria that identify offers and contracts which are illegal and which may generate **conflicts of interest** and reject those that fail the criteria
- P19 define the limits of your professional expertise and set perimeters to work within them
- P20 disclose information obtained from clients only to those who have a legitimate right to receive it
- P21 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** and that service providers adhere to relevant conditions
- P22 communicate with clients in a style and manner which maintains professional independence and maximises goodwill and trust
- P23 define and agree the working practices and the expectations of the people involved in the contract
- P24 set up and implement **systems** to protect the individual, and the interests of society and to indemnify clients where the advice given results in loss or damage to the client
- P25 keep all funds, including interest, held on behalf of clients, separate from personal and organisational funds
- P26 promote a culture of honesty and equity with people, identify areas of weakness and recommend or implement improvements

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#### Knowledge and understanding

*You need to know and understand:*

#### Exchange information and present advice on technical issues

- K1 how to obtain information which is sufficiently detailed for the **purpose** (application)
- K2 how and why to evaluate information which is sufficiently detailed for the **purpose** (evaluation)
- K3 how to **present** technical information and advice which is complete, summarised accurately and relevant to technical issues (application)
- K4 how to **present technical recommendations and judgements** which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available (synthesis)
- K5 how and why to give technical instructions and guidance which are likely to be understood by the people who will follow them (application)
- K6 how to **present technical recommendations and judgements** using a style of communication which is appropriate to the **people receiving information and advice** (application)
- K7 how to adapt the **presentation of technical recommendations and judgements** where people have difficulties understanding them (application)
- K8 how to modify the **presentation of technical recommendations and judgements** where people have difficulties understanding them (application)

#### Resolve complex indeterminate situations

*You need to know and understand:*

- K9 what to identify as existing complex indeterminate situations (understanding)
- K10 how and why to estimate realistically the effects of complex indeterminate situations (analysis)
- K11 how to summarise the issues of complex interminate situations for the organisation (application)
- K12 how and why to assess the validity and completeness of the **information** available (analysis)
- K13 what to identify as any significant gaps in the validity and completeness of the **information** available (understanding)
- K14 how and why to specify sufficient additional **information** to cover any gaps and to provide a valid starting point for the analysis of the situation (evaluation)
- K15 how to obtain sufficient additional **information** to cover any gaps and to

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provide a valid starting point for the analysis of the situation (application)

K16 how and why to analyse **information** (analysis)

K17 how and why to draw valid and justifiable conclusions from **information** (evaluation)

K18 how to apply decision making techniques which increase the reliability of the conclusions (application)

K19 how and why to **reflect** on the conclusions (analysis)

K20 how and why to interpret the conclusions into detailed issues that enable known opportunities and solutions to be identified and utilised for establishing policy (analysis)

#### **Practice within an ethical framework**

*You need to know and understand:*

K21 how and why to make judgements and offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected (evaluation)

K22 how and why to offer advice which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected (synthesis)

K23 how and why to take clear and unequivocal personal responsibility for your own decisions and the decisions of others in your organisation (evaluation)

K24 how to behave in an ethical manner by taking appropriate action if unethical behaviour is brought to your attention (application)

K25 how and why to establish a system of communication to report instances of unethical behaviour which encourages responsibility and empowerment at all levels (synthesis)

K26 how and why to offer judgements and advice which recognise the needs of other people (synthesis)

K27 how and why to manage criteria that identify offers and contracts which are illegal and which may generate **conflicts of interest** (evaluation)

K28 how and why to reject criteria which are illegal and which may generate **conflicts of interest** that fail the criteria (evaluation)

K29 how and why to define the limits of your professional expertise and set perimeters to work within them (evaluation)

K30 how to disclose information obtained from clients only to those who have a legitimate right to receive it (application)

K31 how and why to enter into formal and informal contracts and agreements

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- for advisory and problem-solving services which conform to legal requirements, **ethical standards and recognised good practice** and that service providers adhere to relevant conditions (evaluation)
- K32 how to communicate with clients in a style and manner which maintains professional independence and maximises goodwill and trust (application)
- K33 how and why to define the working practices and the expectations of the people involved in the contract (evaluation)
- K34 how and why to agree the working practices and the expectations of the people involved in the contract (evaluation)
- K35 how and why to set up **systems** to protect the individual, and the interests of society and to indemnify clients where the advice given results in loss or damage to the client (synthesis)
- K36 how to implement **systems** to protect the individual, and the interests of society and to indemnify clients where the advice given results in loss or damage to the client (application)
- K37 how to keep all funds, including interest, held on behalf of clients, separate from personal and organisational funds (application)
- K38 how and why to promote a culture of honesty and equity with people (synthesis)
- K39 what to identify as areas of weakness in the culture (understanding)
- K40 how and why to recommend improvements to the culture (synthesis)
- K41 how to implement improvements to the culture (application)

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#### **Scope/range**

#### **Exchange information and present advice on technical issues**

- 1 Purpose:
  - 1.1 sharing experience
  - 1.2 issuing instructions
  - 1.3 making judgements
  - 1.4 increasing understanding
  - 1.5 implementing a solution
  - 1.6 dealing with confrontation
  - 1.7 negotiation
- 2 Present:
  - 2.1 orally
  - 2.2 in writing
  - 2.3 graphically
  - 2.4 electronically
- 3 Technical recommendations and judgements include:
  - 3.1 realistic estimates of the implications of other options which have been considered
  - 3.2 clear descriptions of the information sources consulted
  - 3.3 the analysis techniques applied
  - 3.4 the criteria used for making evaluations and reaching justifiable conclusions
- 4 People receiving information and advice:
  - 4.1 peers and other related occupations
  - 4.2 clients and customers
  - 4.3 technical and non-technical team members
  - 4.4 craftspeople and operatives
  - 4.5 senior and junior colleagues
  - 4.6 members of the public
  - 4.7 people with individual needs

#### **Resolve complex indeterminate situations**

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- 5 Information:
  - 5.1 project information
  - 5.2 own experience and practice
  - 5.3 manual and electronic information systems (e.g. libraries, technical journals, databases)
  - 5.4 published research
  - 5.5 other colleagues and specialists
  - 5.6 continuing professional development
- 6 Reflect:
  - 6.1 comparison between previous cases and the current situation
  - 6.2 the outcomes required
  - 6.3 known and anticipated limitations and opportunities

#### **Practice within an ethical framework**

- 7 Conflicts of interest:
  - 7.1 actions which may mislead other individuals
  - 7.2 offers which involve the financial interest of the practitioner
  - 7.3 giving unfair advantage to the practitioner's family or friends
  - 7.4 as defined by legislation
- 8 Ethical standards and recognised good practice:
  - 8.1 personal beliefs
  - 8.2 mandatory ethical codes of practice within the occupation, discipline or organisation
  - 8.3 national and international statute law
  - 8.4 national and international voluntary codes of practice and guidance
- 9 Systems:
  - 9.1 organisational policies
  - 9.2 indemnity insurance
  - 9.3 guarantees
  - 9.4 contract conditions



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9.5 bonds

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