

### Overview

This unit is about developing and maintaining the trust and support of colleagues, those to whom you report and people who benefit from your work. It is also about personal development and ethical behaviour.

You will need to develop and maintain effective relationships offering timely relevant information and helpful sensitive advice. You will need to present clear, timely proposals appropriately detailed. You will need to acknowledge objections and resolve conflicts sensitively.

You will need to review your own performance, both by yourself and with your line manager, and identify personal development needs forming these into a development plan. You will need to undertake development activities, record progress and re-review your performance.

You will need to confirm that you are entering into contracts that are both legal and conform to ethical standards and good practice. You will also need to recognise the limits of your professional expertise whilst making judgements and decisions. You will need to communicate with people in a manner which promotes and maintains goodwill and trust.

### Performance criteria

*You must be able to:*

#### Develop and maintain working relationships

- P1 develop and maintain **working relationships** with **people** which **promote goodwill and trust**
- P2 **instruct people** about **work activities** in an appropriate level of detail and with an appropriate degree of urgency
- P3 **provide guidance** and help to **people** about **work activities** with sensitivity and encourage questions, requests for clarification and comments
- P4 **present** proposals for action clearly to **people** at an appropriate time and with the right level of detail for the degree of change, expenditure and risk involved
- P5 **acknowledge** objections to proposals and suggest alternative proposals
- P6 resolve conflicts and differences of opinion in ways which minimise offence and maintain **goodwill, trust** and respect

#### Undertake personal development in the occupational practice area

*You must be able to:*

- P7 define the **aims and objectives** for undertaking **personal development**
- P8 identify and contact **sources of support and guidance** for undertaking **personal development**
- P9 identify and select relevant **benchmarks of competence** against which **personal development** can be measured
- P10 analyse the current personal level of performance against the identified **benchmarks of competence** and record a profile of present competence and **personal development** needs
- P11 prepare a **development plan** for achieving identified development needs
- P12 undertake **development activities** aimed at achieving identified development needs, review and record progress and the effectiveness of the **activities**
- P13 measure achievement of identified development needs and record evidence of competence gained against the identified **benchmarks of competence**
- P14 review the cycle of **personal development aims and objectives** and revise and update **aims and objectives** to suit changing circumstances

#### Practice in an ethical manner

*You must be able to:*

- P15 take clear and unequivocal personal responsibility for your own decisions and the decisions of others in your organisation
- P16 behave in an **ethical manner** and take appropriate action if unethical behaviour is brought to your attention
- P17 establish a system of communication to report instances of unethical behaviour which encourages responsibility and empowerment at all levels
- P18 offer judgements and advice which recognise the needs of other **people**

#### Performance criteria

- P19 manage criteria that identify offers and contracts which are illegal and which may generate **conflicts of interest** and reject those that fail the criteria
- P20 define the limits of your professional expertise and set perimeters to work within them
- P21 disclose information obtained from clients only to those who have a legitimate right to receive it
- P22 check that formal and informal contracts and agreements for advisory and problem solving services conform to legal requirements, **ethical standards** and recognised good practice and that service providers adhere to relevant conditions
- P23 communicate with clients in a style and manner which maintains professional independence and maximises goodwill and trust
- P24 define and agree the working practices and the expectations of the **people** involved in the contract
- P25 manage **systems** to protect individual and the interests of society and to indemnify clients where the advice given results in loss or damage to the client
- P26 keep all funds, including interest, held on behalf of clients, separate from personal and organisational funds
- P27 promote a culture of honesty and equity with **people**, identify areas of weakness and recommend or implement improvements

### Knowledge and understanding

*You need to know and understand:*

#### Develop and maintain working relationships

- K1 how and why to develop **working relationships** with **people** which **promote goodwill and trust** (synthesis)
- K2 how to maintain **working relationships** with **people** which **promote goodwill and trust** (application)
- K3 how to **instruct people** about **work activities** in an appropriate level of detail and with an appropriate degree of urgency (application)
- K4 how and why to **provide guidance** and help to **people** about **work activities** with sensitivity (synthesis)
- K5 how to encourage questions, requests for clarification and comments (application)
- K6 how to **present** proposals for action to **people** at an appropriate time and with the right level of detail for the degree of change, expenditure and risk involved (application)
- K7 how to **acknowledge** objections to proposals (application)
- K8 how and why to suggest alternative proposals where objections have been raised in respect of existing proposals (synthesis)
- K9 how and why to resolve conflicts and differences of opinion in ways which minimise offence, and maintain **goodwill, trust** and respect (synthesis)

#### Undertake personal development in the occupational practice area

*You need to know and understand:*

- K10 how and why to define the **aims and objectives** for undertaking **personal development** (evaluation)
- K11 what to identify as **sources of support and guidance** for undertaking **personal development** (understanding)
- K12 how to contact **sources of support and guidance** for undertaking **personal development** (application)
- K13 what to identify as relevant **benchmarks of competence** against which **personal development** can be measured (understanding)
- K14 how and why to select relevant **benchmarks of competence** against which **personal development** can be measured (evaluation)
- K15 how and why to analyse the current personal level of performance against the identified **benchmarks of competence** (analysis)
- K16 how to record a profile of present competence and **personal development** needs (application)
- K17 how and why to prepare **a development plan** (synthesis)
- K18 how to undertake **development activities** (application)
- K19 how and why to review progress and the effectiveness of the **activities** (analysis)

### Knowledge and understanding

- K20 how to record progress and the effectiveness of the **activities** (application)
- K21 how to measure achievement of identified development needs against the identified **benchmarks of competence** (application)
- K22 how to record evidence of competence gained against the identified **benchmarks of competence** (application)
- K23 how and why to review the cycle of **personal development aims and objectives** (analysis)
- K24 how to revise and update **personal development aims and objectives** to suit changing circumstances (application)

### Practice in an ethical manner

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

- K25 how and why to take clear and unequivocal personal responsibility for your own decisions and the decisions of others in your organisation (evaluation)
- K26 how to behave in an **ethical manner** and take appropriate action if unethical behaviour is brought to your attention (application)
- K27 how and why to establish a system of communication to report instances of unethical behaviour which encourages responsibility and empowerment at all levels (synthesis)
- K28 how and why to offer judgements and advice which recognise the needs of other **people** (synthesis)
- K29 how and why to manage criteria that identify offers and contracts which are illegal and which may generate **conflicts of interest** and reject those that fail the criteria (evaluation)
- K30 how and why to define the limits of your professional expertise and set perimeters to work within them (evaluation)
- K31 how and why to disclose information obtained from clients only to those who have a legitimate right to receive it (application)
- K32 how to check that formal and informal contracts and agreements for advisory and problem solving services conform to legal requirements, **ethical standards** and recognised good practice and that service providers adhere to relevant conditions (application)
- K33 how to communicate with clients in a style and manner which maintains professional independence and maximises goodwill and trust (application)
- K34 how and why to define the working practices and the expectations of the **people** involved in the contract (evaluation)
- K35 how and why to agree the working practices and the expectations of the **people** involved in the contract (evaluation)

## COSCCOMO04 (SQA Unit Code - HA3P 04)

### Develop and maintain working relationships and personal development in construction contracting operations management

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#### Knowledge and understanding

- K36 how and why to manage **systems** to protect individual and the interests of society and to indemnify clients where the advice given results in loss or damage to the client (evaluation)
- K37 how to keep all funds, including interest, held on behalf of clients, separate from personal and organisational funds (application)
- K38 how to promote a culture of honesty and equity with **people** (application)
- K39 how and why to identify areas of weakness and recommend improvements (synthesis)
- K40 how to implement improvements where areas of weakness have been identified (application)

### Scope/range

#### Develop and maintain working relationships

- 1 Working relationships:
  - 1.1 formal
  - 1.2 informal
- 2 People:
  - 2.1 those commissioning work
  - 2.2 employers
  - 2.3 employees
  - 2.4 clients and customers
  - 2.5 statutory and regulatory bodies
  - 2.6 users and community groups
  - 2.7 contractors
  - 2.8 consultants
  - 2.9 partners
  - 2.10 near neighbours
  - 2.11 occupiers
  - 2.12 general public
  - 2.13 people with specific access and communication needs
  - 2.14 suppliers of products and services
  - 2.15 government agencies
  - 2.16 non English speakers
  - 2.17 local community
  - 2.18 society at large (locally and globally)
- 3 Promote goodwill and trust:
  - 3.1 demonstrating a duty of care
  - 3.2 ethical relationships
  - 3.3 professional independence
  - 3.4 honouring promises and undertakings
  - 3.5 honest relationships
  - 3.6 constructive relationships
  - 3.7 equal opportunities
  - 3.8 acknowledge diversity
- 4 Instruct, provide guidance, present and acknowledge:

### Scope/range

- 4.1 orally
- 4.2 in writing
- 4.3 using graphics
- 4.4 electronically
- 5 Work activities:
  - 5.1 progress
  - 5.2 results
  - 5.3 achievements
  - 5.4 potential problems
  - 5.5 risks
  - 5.6 opportunities

### Undertake personal development in the occupational practice area

- 6 Aims and objectives:
  - 6.1 preparation for career development
  - 6.2 intellectual challenge
  - 6.3 need for updating
  - 6.4 need to provide evidence of maintenance of vocational competence
  - 6.5 compliance with employer and professional requirements
  - 6.6 awareness of shortcomings
  - 6.7 organisational credibility
- 7 Personal development:
  - 7.1 maintenance of existing competence
  - 7.2 improvements to existing competence
  - 7.3 development of new competence
  - 7.4 commitment to vocational excellence
- 8 Sources of support and guidance:
  - 8.1 national/industry bodies
  - 8.2 professional institutions
  - 8.3 education and training providers
  - 8.4 in house
- 9 Benchmarks of competence
  - 9.1 job descriptions



### Scope/range

- 9.2 personal specification
- 9.3 professional institution requirements
- 9.4 industry standards (e.g. card schemes, best practice)
- 9.5 national occupational standards
- 10 Development plan includes:
  - 10.1 priorities
  - 10.2 target dates
  - 10.3 development activities
- 11 Development activities:
  - 11.1 formal courses
  - 11.2 research
  - 11.3 work experience
  - 11.4 personal study
  - 11.5 work shadowing/secondments
  - 11.6 mentoring including professional discussions
  - 11.7 developing personal networks
  - 11.8 publications

### Practice in an ethical manner

- 12 Systems
  - 12.1 organisational policies and procedures
  - 12.2 indemnity insurance
  - 12.3 guarantees
  - 12.4 contract conditions
  - 12.5 bonds
- 13 People:
  - 13.1 those commissioning work
  - 13.2 employers
  - 13.3 employees
  - 13.4 clients and customers
  - 13.5 statutory and regulatory bodies
  - 13.6 users and community groups
  - 13.7 contractors

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#### Scope/range

- 13.8 consultants
- 13.9 partners
- 13.10 near neighbours
- 13.11 occupiers
- 13.12 general public
- 13.13 people with specific access and communication needs
- 13.14 suppliers of products and services
- 13.15 government agencies
- 13.16 non English speakers
- 13.17 local community
- 13.18 society at large (locally and globally)
- 14 Conflicts of interest:
  - 14.1 actions which may mislead other individuals
  - 14.2 actions which involve the financial interest of the practitioner
  - 14.3 giving unfair advantage to the practitioners family or friends
  - 14.4 as defined by legislation
- 15 Ethical standards:
  - 15.1 personal beliefs
  - 15.2 ethical codes of practice within the occupation, discipline or organisation
  - 15.3 statute law both national and international voluntary codes of practice

## COSCCOMO04 (SQA Unit Code - HA3P 04)

Develop and maintain working relationships and personal development in construction contracting operations management



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**Status** Original

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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** Construction Contracting Operations Management

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