

Overview

This unit is concerned with the integration of your personal and professional competence. It is about getting the best out of your relationships with other people. This is about “emotional competence” – being confident about your own control of yourself, the design itself and the project team, so that you can deal with the concerns of other people in a constructive way.

It is about communicating technical information to other people, and ensuring that they understand it. You must be able to “talk their language”, and maintain their trust in you and their support for your work. It is about identifying problems, producing alternative solutions, and recommending the best ones. The “situation” could be both a challenge and an opportunity. It is about working within appropriate codes of conduct.

It is about managing meetings effectively. You must be able to agree the objectives of the meeting, manage the meeting to maximise everyone’s contribution, summarise what has been achieved, and tell those who need to know.

Performance criteria

You must be able to:

Develop and maintain relationships with other people

- P1 develop, maintain and encourage working relationships with **people** which **promote goodwill and trust**
- P2 **inform people** about **work activities** with an appropriate level of detail and degree of urgency
- P3 **offer advice** 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 **clarify** with **people** 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

Exchange information and present advice on technical issues

You must be able to:

- P7 obtain information which is sufficiently detailed for the **purpose**
- P8 **present** technical information and advice which is complete, summarised accurately and relevant to technical issues
- P9 **present** technical recommendations which are clear, accurate and valid, and which represent the best advice possible, given the information and resources available
- P10 give technical instructions and guidance which are likely to be understood by the people who will follow them
- P11 **present** technical information and advice using a style of communication which is appropriate to the the **people receiving information and advice**
- P12 adapt and modify technical information where people have difficulties in understanding it

Identify, analyse and resolve complex situations

You must be able to:

- P13 identify where complex situations exist, estimate their effects and summarise the issues for the people who are affected and concerned
- P14 assess the accuracy and completeness of the **information** available, identify any significant gaps and obtain additional **information**
- P15 identify, describe and record the probable factors affecting the situations
- P16 **analyse the different perceptions of situations** in order to produce resolutions
- P17 apply **aids and techniques** which increase the reliability of the decisions and **judgements**
- P18 identify ethical **judgements** using clear **criteria** and reasoned arguments which are likely to resolve the situation with the least disruption and risk

Performance criteria

- P19 justify, using clear **criteria** and reasoned arguments, ethical **judgements** which are likely to resolve the situation with the least disruption and risk
- P20 recommend those **judgements** which offer the least disruption and risk
- P21 record those **judgements** which offer the least disruption and risk

Practice within an ethical framework

You must be able to:

- P22 identify the limits of your professional expertise and work within them
- P23 contribute to developing and maintaining a value base for one's organisation which considers the needs of the **stakeholders**
- P24 make **judgements** and offer advice which balance the needs of the client, the people in the community who are directly and indirectly affected and the resources available
- P25 take clear and unequivocal personal responsibility for decisions
- P26 disclose information obtained from clients only to people who have a right to receive it
- P27 communicate with **stakeholders** in a style and manner which maintains professional independence and maximises goodwill and trust
- P28 define and agree the terms of reference and the expectations of the people involved in contracts
- P29 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**
- P30 refuse offers and contracts which are illegal and which may generate **conflicts of interest**

Prepare for and chair meetings

You must be able to:

- P31 ensure that the appropriate people are invited to the **meeting** and given sufficient notice and information to allow them to contribute effectively
- P32 ensure that everyone attending the **meeting** agrees the **objective** of the **meeting** at the start
- P33 allocate discussion time to topics consistently with their importance, urgency and complexity
- P34 maintain a style of leadership which helps those attending the **meeting** to make useful contributions
- P35 discourage unhelpful arguments and digressions
- P36 present information and provide summaries clearly, at appropriate points during the **meeting** to make useful contributions
- P37 ensure that **meetings** achieve their **objectives** within the allocated time

**Performance
criteria**

- P38 observe any formal procedures or standing orders that apply to the **meeting**
- P39 check that decisions and action points are accurately recorded and promptly communicated to those who need to know
- P40 evaluate whether the purpose and **objectives** of the **meeting** have been achieved and how future **meetings** could be made more effective

Knowledge and understanding

You need to know and understand:

Develop and maintain relationships with other people

- K1 how and why to develop working relationships with **people** which promote goodwill and trust (synthesis)
- K2 how to maintain and encourage working relationships with **people** which **promote goodwill and trust** (application)
- K3 how to **inform people** about **work activities** with an appropriate level of detail and degree of urgency (application)
- K4 how to **offer advice** and help to **people** about **work activities** with sensitivity and encourage questions, requests for clarification and comments (application)
- K5 how to **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 (application)
- K6 how to **clarify** with **people** objections to proposals and suggest alternative proposals (application)
- K7 how and why to resolve conflicts and differences of opinion in ways which minimise offence, and maintain goodwill, trust and respect (synthesis)

Exchange information and present advice on technical issues

You need to know and understand:

- K8 how to obtain information which is sufficiently detailed for **purpose** (application)
- K9 how and why to **present** technical information and advice (application)
- K10 how and why to **present** technical information and advice in a style appropriate to the **people receiving information and advice** (application)
- K11 how and why to give technical instructions and guidance (application)how to **present** technical recommendations (application)
- K12 how to adapt and modify technical information where people are having difficulties in understanding it (application)

Identify, analyse and resolve complex situations

You need to know and understand:

- K13 what to identify as complex situations (understanding)
- K14 how and why to estimate their effects and summarise the issues for the people who are affected and concerned (analysis)
- K15 how and why to assess the accuracy and completeness of the **information** available (analysis)
- K16 what to identify as any significant gaps in the **information** available (understanding)
- K17 how to obtain additional **information** (application)
- K18 what to identify as the probable factors affecting the situations (understanding)
- K19 what to describe as the probable factors affecting the situations (understanding)

Knowledge and understanding

- K20 how to record the probable factors affecting the situations (application)
- K21 how and why to **analyse the different perceptions of situations** in order to produce resolutions (analysis)
- K22 how to apply **aids and techniques** which increase the reliability of the decisions and **judgements**
- K23 what to identify ethical **judgements** which are likely to resolve the situation with the least disruption and risk using clear **criteria** and reasoned arguments, (understanding)
- K24 how and why to justify, using clear **criteria** and reasoned arguments, ethical **judgements** which are likely to resolve the situation with the least disruption and risk (evaluation)
- K25 how and why to recommend those **judgements** which offer the least disruption and risk (synthesis)
- K26 how to record those **judgements** which offer the least disruption and risk (application)

Practice within an ethical manner

You need to know and understand:

- K27 what to identify as the limits of your professional expertise and work within them (understanding)
- K28 how to contribute to developing and maintaining a value base for one's organisation which considers the needs of the **stakeholders** (application)
- K29 how and why to make judgements and offer advice which balance the needs of the client, the people in the community who are directly and indirectly affected and the resources available (evaluation)
- K30 how and why to take clear and unequivocal personal responsibility for decisions (evaluation)
- K31 how to disclose information obtained from clients only to people who have a right to receive it (application)
- K32 how to communicate with **stakeholders** in a style and manner which maintains professional independence and maximises goodwill and trust (application)
- K33 how and why to define and agree the terms of reference and the expectations of the people involved in contracts (evaluation)
- K34 how and why 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** (evaluation)
- K35 how and why to refuse offers and contracts which are illegal and which may generate **conflicts of interest** (evaluation)

Knowledge and understanding

You need to know and understand:

Prepare for and chair meetings

- K36 how to ensure that the appropriate people are invited to the **meeting** and given sufficient notice and information to allow them to contribute effectively (application)
- K37 how to ensure that everyone attending the **meeting** agrees the **objective** of the **meeting** at the start (application)
- K38 how to allocate discussion time to topics consistently with their importance, urgency and complexity (application)
- K39 how and why to maintain a style of leadership which helps those attending the **meeting** to make useful contributions (synthesis)
- K40 how and why to discourage unhelpful arguments and digressions (synthesis)
- K41 how to present information and provide summaries clearly, at appropriate points during the **meeting** to make useful contributions (application)
- K42 how to ensure that **meetings** achieve their **objectives** within the allocated time (application)
- K43 how to observe any formal procedures or standing orders that apply to the **meeting** (application)
- K44 how to check that decisions and action points are accurately recorded and promptly communicated to those who need to know (application)
- K45 how and why to evaluate whether the purpose and **objectives** of the **meeting** have been achieved and how future **meetings** could be made more effective (evaluation)

Scope/range

Develop and maintain relationships with other people

- 1 People:
 - 1.1 those to whom you report
 - 1.2 those who report to you
 - 1.3 other professional colleagues
 - 1.4 those affected by your work
- 2 Promote goodwill and trust:
 - 2.1 demonstrating a duty of care
 - 2.2 ethical relationships
 - 2.3 professional independence
 - 2.4 honouring promises and undertakings
 - 2.5 open and honest relationships
 - 2.6 constructive relationships
 - 2.7 meeting equality/diversity legislation
- 3 Informing, offering advice, presenting and clarifying:
 - 3.1 orally
 - 3.2 in writing
 - 3.3 using graphics
 - 3.4 electronically
- 4 Work activities:
 - 4.1 progress
 - 4.2 results
 - 4.3 achievements
 - 4.4 emerging threats
 - 4.5 risks
 - 4.6 opportunities
- 5 Present:
 - 5.1 orally
 - 5.2 in writing
 - 5.3 graphically
 - 5.4 electronically
 - 5.5 using materials and samples

Scope/range

Exchange information and present advice on technical issues

- 6 Purpose:
 - 6.1 sharing experience
 - 6.2 issuing instructions
 - 6.3 making decisions
 - 6.4 increasing understanding
 - 6.5 implementing a solution
 - 6.6 dealing with confrontation
 - 6.7 negotiation
- 7 Present:
 - 7.1 orally
 - 7.2 in writing
 - 7.3 graphically
 - 7.4 electronically
 - 7.5 using materials and samples
- 8 People receiving information and advice:
 - 8.1 same and other related occupations
 - 8.2 clients and customers
 - 8.3 technical and non-technical team members
 - 8.4 craftspeople and operatives
 - 8.5 senior and junior colleagues
 - 8.6 members of the public
 - 8.7 people with individual needs
 - 8.8 central and local government agencies

Identify, analyse and resolve complex, indeterminate situations

- 9 Information - sources:
 - 9.1 experience and practice
 - 9.2 manual and electronic information systems (e.g. libraries, technical journals, databases)
 - 9.3 valid objects of scientific enquiry
 - 9.4 other colleagues and specialists
- 10 Analysing the different perceptions of situations:
 - 10.1 information and conclusions from previous cases

Scope/range

- 10.2 similarities between previous cases and the current situation
- 10.3 the outcomes required
- 10.4 known and anticipated limitations
- 10.5 known and anticipated opportunities
- 11 Aids and techniques:
 - 11.1 identify options
 - 11.2 relationships between factors
 - 11.3 weighted priorities
 - 11.4 value utilities
 - 11.5 expert systems
 - 11.6 decision theory
 - 11.7 decision trees
 - 11.8 policy capturing equations
 - 11.9 gold standard equations
 - 11.10 graphical and electronic aids
 - 11.11 computer aided analysis
- 12 Judgements:
 - 12.1 justified opinion and conclusion
 - 12.2 decisions on action to be taken
 - 12.3 decisions on validity
 - 12.4 decisions on viability
 - 12.5 identification of opportunities
 - 12.6 identification of solutions
- 13 Criteria:
 - 13.1 the interests of the stakeholders
 - 13.2 legal
 - 13.3 conformity with recognised good practice
 - 13.4 based on up to date information
 - 13.5 cost-effectiveness
 - 13.6 resources
 - 13.7 safety
 - 13.8 return to operational state
 - 13.9 predicted risk

Scope/range

- 13.10 predicted disruption
- 13.11 predicted opportunity
- 13.12 added value

Practise within an ethical framework

- 14 Stakeholders:
 - 14.1 staff
 - 14.2 clients
 - 14.3 suppliers/sub-contractors
 - 14.4 users
 - 14.5 community
- 15 Judgements:
 - 15.1 justified opinion and conclusion
 - 15.2 decisions on action to be taken
 - 15.3 decisions on validity
 - 15.4 decisions on viability
 - 15.5 identification of opportunities
 - 15.6 identification of solutions
- 16 Ethical standards and recognised good practice - sources:
 - 16.1 ethical codes of practice within the occupation or discipline
 - 16.2 statute law
 - 16.3 voluntary codes of practice
 - 16.4 duty of care
- 17 Conflicts of interest:
 - 17.1 offers which may result in adverse conditions to other individuals or the community
 - 17.2 offers which involve the financial interest of the practitioner
 - 17.3 giving unfair advantage to the practitioners family or friends

Prepare for and chair meetings

- 18 Meetings:
 - 18.1 involving people from within your organisation
 - 18.2 involving people from outside your organisation
- 19 Objective:

COSBEDMC04- SQA Unit Code HG3W 04
Develop and maintain professional relationships and
practice in built environment design management



Scope/range

- 19.1 information giving
- 19.2 consultation
- 19.3 decision making

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