

# ASTSPM3O13

## Control income and expenditure within a surveying environment



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### Overview

#### The Standards that are part of this Unit

SPM3/O13.1 Prepare and agree budgets

SPM3/O13.2 Manage and implement budgets

This unit is about drafting budgets and agreeing that budget with management. The second standard is about methods to monitor spend.

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### Performance criteria

#### Prepare and agree budgets

- You must be able to:*
- P1 gathering and evaluating available information and preparing a draft **budget**
  - P2 submitting and justifying the draft **budget** with line manager and agreeing a final **budget**
  - P3 confirming and implementing an appropriate **method** of maintaining overall control of the budget
  - P4 identifying and agreeing appropriate **methods** and timescales for re-forecasting and reporting contingencies and **variances**

#### Manage and implement budgets

- You must be able to:*
- P5 specifying and agreeing how **income** receipts and **expenditure** will be made against budget
  - P6 recording and verifying actual **expenditure**
  - P7 recording information about income due and received
  - P8 keeping **records** and receipts which support **expenditure**
  - P9 producing clear, accurate accounts for payments at agreed stages

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### Knowledge and understanding

*You need to know and understand:*

#### Prepare and agree budgets

- K1 how do you gather available information? (understanding) (a)[1]
- K2 how and why do you evaluate available information and prepare a draft **budget**? (evaluation) (a)[1,2,3]
- K3 how do you submit the draft **budget**? (application)(b)[1,2]
- K4 how and why do you justify and agree a final **budget** with line manager? (b) (synthesis) (b) [1,2]
- K5 how do you confirm and implement an appropriate **method** of maintaining overall control of the **budget**? (application) (c) [1,2]
- K6 what do you identify as appropriate **methods** and timescales for re-forecasting and reporting contingencies and **variances**? (understanding) (d) [3]
- K7 how and why do you agree appropriate **methods** and timescales for re-forecasting and reporting contingencies and **variances**? (synthesis) (d) [3]

#### Manage and implement budgets

*You need to know and understand:*

- K8 how and why do you specify and agree how **income** receipts and expenditure will be made against **budget**? (evaluation) (a) [1,2]
- K9 how do you record and verify **expenditure**? (application) (b) [2]
- K10 how do you record information about **income** due and received? (application) (c) [1]
- K11 how do you keep **records** and receipts which support **expenditure**? (application) (d) [2,3]
- K12 how do you produce accurate accounts for payments at agreed stages? (application) (e) [3]

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### Additional Information

#### Scope/range related to performance criteria

#### Prepare and agree budgets

- 1 **Budget headings:**
  - 1.1 income
  - 1.2 expenditure
- 2 **Method:**
  - 2.1 forecasts
  - 2.2 cash flow
- 3 **Variances:**
  - 3.1 overspend
  - 3.2 underspend

#### Manage and implement budgets

- 4 **Income:**
  - 4.1 income
  - 4.2 fees
  - 4.3 rent
  - 4.4 service charges
- 5 **Expenditure:**
  - 5.1 capital
  - 5.2 revenue
  - 5.3 recoverable
  - 5.4 non-recoverable
  - 5.5 VAT
- 6 **Records may be:**
  - 6.1 manual
  - 6.2 electronic

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**Originating organisation** Asset Skills

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**Relevant occupations** Professional Occupations; Construction, planning and the built env; Building and construction; Architects, Town Planners and Surveyors

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**Suite** Surveying, Property Maintenance 2010

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