

# COSBEDCL4008

## Manage and implement incentive schemes in planning and conservation



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### Overview

In a planning context this unit concerns managing the process of making applications for grants. Grants might be given to encourage people to improve commercial or industrial premises and shop fronts, or to improve listed buildings, for example.

In relation to the field of conservation this unit requires knowledge of the availability and administration of grant schemes for the repair and enhancement of historic buildings and areas.

You will need to process applications for grants in line with agreed procedures and timescales. You will need to manage the grant regime in line with agreed policies and targets.

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### Performance criteria

#### Process and determine applications for financial incentives

*You must be able to:*

- P1 acknowledge **applications** for **incentives** promptly and assess them against **statutory and policy requirements**
- P2 identify inconsistent and incomplete **information** in **applications** and **ask** applicants for more **information**, clarification and proof
- P3 assess **applications** against the relevant technical regulations, policy and decision criteria and process those which are likely to meet the criteria following detailed evaluation
- P4 reject **applications** which fail the assessment process and which are unlikely to meet the evaluation criteria following revision, and prepare a justified rejection to send to unsuccessful applicants
- P5 evaluate in detail those **applications** which have been assessed positively, calculate the level of **incentives** and specify appropriate and realistic conditions
- P6 justify decisions clearly, draft the conditions in an appropriate format and pass it on to the applicant
- P7 check that applicants are complying with the conditions applying to **incentives**, identify those who are not and advise them on what they need to do to comply with the conditions
- P8 complete the decision making process within the time allowed and to meet **statutory and policy requirements**

#### Manage incentive schemes

*You must be able to:*

- P9 monitor and control an **incentive scheme** to ensure compliance
- P10 calculate the level of funding needed, identify the funding bodies available and whether there are any time constraints
- P11 calculate the cost of **incentive** payments and commitments, deduct the total from the funding available and calculate the shortfall
- P12 prioritise the use of **incentives** to meet the constraints of the staff, resources, time and funding available

# COSBEDCL4008

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### Knowledge and understanding

*You need to know and understand:*

### Process and determine applications for financial incentives

- K1 how to acknowledge **applications** for **incentives** (application)
- K2 how to process those **applications** which are likely to meet the criteria (application)
- K3 how to prepare a justified rejection to send to unsuccessful applicants (application)
- K4 how and why to assess **applications** against the relevant technical regulations, policy and decision criteria (analysis)
- K5 how and why to reject **applications** which fail the assessment process and which are unlikely to meet the evaluation criteria following revisions (evaluation)
- K6 how and why to evaluate in detail those **applications** which have been assessed positively (evaluation)
- K7 how and why to assess **applications** against **statutory and policy requirements** (analysis)
- K8 what to identify as inconsistent and incomplete **information** in **applications** (understanding)
- K9 how to calculate the level of **incentives** (application)
- K10 how to check that applicants are complying with the conditions applying to **incentives** (application)
- K11 how and why to advise those applicants who are not complying with the conditions applying to **incentives** on what they need to do to comply with the conditions (synthesis)
- K12 how and why to specify appropriate and realistic conditions (evaluation)
- K13 how to pass decisions and conditions on to the applicant (application)
- K14 how to complete the decision making process within the time allowed and to meet **statutory and policy requirements** (application)
- K15 how and why to justify decisions and draft the conditions in an appropriate format (evaluation)
- K16 how to **ask** applicants for more **information**, clarification and proof (application)

### Manage incentive schemes

*You need to know and understand:*

- K17 how and why to monitor and control an **incentive scheme** to ensure compliance (evaluation)
- K18 how to calculate the cost of **incentive** payments and commitments (application)
- K19 how to deduct the total costs from the funding available and calculate the shortfall (application)
- K20 how and why to prioritise the use of **incentives** to meet the constraints of the staff, resources, time and funding available

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### **Manage and implement incentive schemes in planning and conservation**

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(analysis)

K21 what to identify as the funding bodies available (understanding)

K22 what do identify as any time constraints (understanding)

K23 how to calculate the level of funding needed (application)

# COSBEDCL4008

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### Scope/Range

#### Process and determine applications for financial incentives

- 1 Applications - type:**
  - 1.1 grant
  - 1.2 loan
  - 1.3 subsidy
- 2 Incentives - relevant to:**
  - 2.1 mixed use
  - 2.2 the development and use of land
  - 2.3 structures
  - 2.4 buildings
  - 2.5 plant and equipment
  - 2.6 health and safety
  - 2.7 environment
- 3 Statutory and policy requirements:**
  - 3.1 local
  - 3.2 national
  - 3.3 international
- 4 Information - type:**
  - 4.1 plans, drawings, calculations
  - 4.2 technical information
  - 4.3 financial information
  - 4.4 test data
  - 4.5 national and international standards and codes of practice
- 5 Information - from:**
  - 5.1 client
  - 5.2 contractors
  - 5.3 consultants
  - 5.4 sub-contractors
- 6 Ask:**
  - 6.1 orally
  - 6.2 in writing
  - 6.3 formally
  - 6.4 informally

#### Manage incentive schemes

- 7 Incentive schemes:**
  - 7.1 grants
  - 7.2 loans
  - 7.3 subsidies

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<b>Developed by</b>	ConstructionSkills
<b>Version Number</b>	2
<b>Date Approved</b>	March 2012
<b>Indicate review date</b>	March 2018
<b>Validity</b>	Current
<b>Status</b>	Original
<b>Originating organisation</b>	ConstructionSkills
<b>Original URN</b>	COSBEDCL4008
<b>Relevant occupations</b>	Town planners; chartered surveyors (not quantity surveyors); building inspectors; construction project manager and related professions
<b>Suite</b>	Town Planning, Conservation and Building Control
<b>Key Words</b>	incentive schemes; planning; conservation; grants; heritage

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