

COSTPCBCB52.1-B52.2

Prepare, present and advise on project recommendations in conservation



Overview

This unit requires an ability to present recommendations, proposals and project options to both professional and lay audiences. You need to be able to assess options against the brief, consult with interested parties and negotiate modifications where necessary.

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Performance criteria

Prepare and present project recommendations

- You must be able to:*
- P1 choose **presentation methods** and techniques which make the best use of resources and have the potential to communicate project options clearly
 - P2 agree with the project team and the client the purpose of the presentation and the **presentation methods** which will be used
 - P3 prepare clear and accurate **presentational materials** which support the project options and use them to facilitate discussions
 - P4 present the recommendations, proposals and project options clearly and objectively and show how they are justified by the requirements of the brief
 - P5 present the information in a way which promotes the goodwill and trust of the **audience**
 - P6 provide valid evidence to support changes to the agreed criteria in cases where the project proposal or options do not meet all the requirements of the brief
 - P7 encourage the **audience** to ask questions, ask for clarification and to make comments at appropriate stages in the presentation and provide additional information to ensure their understanding
 - P8 define, agree and record amendments and variations which are required by the client

Advise on the selection and modification of project recommendations

- You must be able to:*
- P9 identify elements of the solutions which meet the requirements of the original brief and any subsequent modifications
 - P10 identify changes in the project that are not reflected in any formal variations to the brief
 - P11 **advise people who have an interest** on how well the proposals match the objective criteria in the brief
 - P12 **advise people who have an interest** on the creative interpretation of the brief and overall project solution
 - P13 explain how the overall project solution can meet both the technical and functional constraints in the brief, the requirements of the client and regulatory authorities
 - P14 **advise people who have an interest** in the project and ensure that they understand the **implications** of accepting, modifying or rejecting proposals
 - P15 **advise people who have an interest** on how much more advice, research and consultancy will be necessary to produce a project solution which is acceptable
 - P16 confirm with the **people who have an interest** whether recommendations are accepted, modified or rejected

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Knowledge and understanding

You need to know and understand:

Prepare and present project recommendations

- K1 how to show how recommendations, proposals and project options are justified by the requirements of the brief (application)
- K2 how and why to provide valid evidence to support necessary changes to the agreed criteria (synthesis)
- K3 how and why to choose **presentation methods** and techniques (evaluation)
- K4 how and why to agree with the project team and the client the purpose of the presentation and the **presentation methods** which will be used (evaluation)
- K5 how to **present** the recommendations, proposals and project options (application)
- K6 how to prepare clear and accurate **presentation materials** and use them to facilitate discussions (application)
- K7 how to encourage the **audience** to ask questions, ask for clarification and to make comments at appropriate stages in the **presentation** (application)
- K8 how and why to provide additional information to the **audience** to ensure their understanding (synthesis)
- K9 how and why to define, agree and record amendments and variations which are required by the client (evaluation)

Advise on the selection and modification of project recommendations

You need to know and understand:

- K10 how to explain how the overall project solution can meet both the technical and functional constraints in the brief, and the requirements of the client and regulatory authorities (application)
- K11 how and why to **advise people who have an interest** on how well the proposals match the objective criteria in the brief (synthesis)
- K12 how and why to **advise people who have an interest** in the creative interpretation of the brief and overall project solution (synthesis)
- K13 how and why to **advise people who have an interest** on the **implications** of accepting, modifying or rejecting proposals (synthesis)
- K14 how and why to ensure that **people who have an interest** in the project understand the **implications** of accepting, modifying or rejecting proposals (application)
- K15 how and why to **advise people who have an interest** on how much more advice, research and consultancy will be necessary (synthesis)
- K16 what elements of the solution do you identify as meeting the requirements of the original brief and any subsequent modifications (understanding)
- K17 what changes in the project do you identify as not being reflected in

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- K18 any formal variations to the brief (understanding)
- how to confirm with **people who have an interest** whether the recommendation are accepted, modified or rejected (application)

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Scope/Range

Prepare and present project recommendations

- 1 Presentation methods:**
 - 1.1 documentary
 - 1.2 quality benchmarking analysis
 - 1.3 comparative studies with similar projects
 - 1.4 illustrated oral presentations
 - 1.5 computer modelled simulations
 - 1.6 public exhibition
- 2 Presentation materials:**
 - 2.1 sketches
 - 2.2 drawings and projections
 - 2.3 physical models
 - 2.4 computer generated data
 - 2.5 diagrams
 - 2.6 mathematical modelling
 - 2.7 photo-montage
 - 2.8 mock-ups
 - 2.9 written reports
 - 2.10 3D computer models
- 3 Audience:**
 - 3.1 client
 - 3.2 financial advisers
 - 3.3 consultants
 - 3.4 potential contractors
 - 3.5 potential subcontractors and suppliers
 - 3.6 potential investors
 - 3.7 partners in development programme
 - 3.8 prospective occupiers
 - 3.9 prospective users
 - 3.10 community groups
 - 3.11 regulatory authorities
 - 3.12 public interest organisations
 - 3.13 media

Advise on the selection and modification of project recommendations

- 4 Advise:**
 - 4.1 in writing
 - 4.2 orally
 - 4.3 graphically

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- 5** **People who have an interest:**
 - 5.1 the client
 - 5.2 financial advisers
 - 5.3 consultants
 - 5.4 potential contractors
 - 5.5 potential subcontractors and suppliers
 - 5.6 potential investors
 - 5.7 partners in development programme
 - 5.8 prospective occupiers
 - 5.9 prospective users
 - 5.10 community groups
 - 5.11 regulatory authorities
 - 5.12 public interest organisations
 - 5.13 media

- 6** **Implications for:**
 - 6.1 cost
 - 6.2 the programme
 - 6.3 performance
 - 6.4 design quality
 - 6.5 best value
 - 6.6 buildability
 - 6.7 sustainability/low carbon/energy use
 - 6.8 health and safety

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Relevant occupations Town planners; chartered surveyors (not quantity surveyors); building inspectors; construction project manager and related professions

Suite Town Planning, Conservation and Building Control

Key Words Recommendations; proposals; design options; brief
