

Activity 25

Incremental Review August 2009

Surveying, Property & Maintenance (Maintenance) (Quantity Surveying) (General Practice) (Building Surveying) (Valuation)

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Surveying, Property & Maintenance

The Unit:

/O15 Plan, implement and monitor the maintenance of property

The Standards that are part of this Unit

/O15.1 Plan and schedule a planned preventative maintenance programme

/O15.2 Implement and monitor planned preventative maintenance and emergency works

The Unit Commentary

This unit is about the development of programmes for planned maintenance and the setting up of maintenance programmes for emergency/unplanned works, checking and verifying work undertaken

Change agreed to range 3 (9)

O15 Plan, implement and monitor the maintenance of property

O15.1 Plan and schedule a planned preventative maintenance programme

Performance Criteria - this involves...

- (a) planning and scheduling in accordance with agreed objectives for the **planned preventative maintenance** of property
- (b) reviewing **influencing factors** and **guidance material** about the **planned preventative maintenance** of property
- (c) prioritising the **maintenance** and having regard to all the **influencing factors**
- (d) preparing and agreeing plans and schedules of **maintenance** for implementation with the line manager

The Range...

- [1] Maintenance:**
 - (1) scheduled and preventative;
 - (2) unscheduled and corrective;
 - (3) emergency
- [2] Planned preventative maintenance:**
 - (1) structure;
 - (2) materials;
 - (3) finishes;
 - (4) fittings;
 - (5) services;
 - (6) external works
- [3] Influencing factors:**
 - (1) changing user requirements;
 - (2) contractual requirements;
 - (3) statutory requirements;
 - (4) health and safety requirements;
 - (5) resource allocation;
 - (6) operational requirements;
 - (7) environmental considerations;
 - (8) fair wear and tear/damage;
 - (9) **energy performance of the building**
- [4] Guidance material:**
 - (1) owner's manuals;
 - (2) log books;
 - (3) maintenance schedules and manuals;
 - (4) practice guides and specifications

O15 Plan, implement and monitor the maintenance of property

O15.1 Plan and schedule a planned preventative maintenance programme

knowledge and understanding

- (1) How and why do you plan and schedule in accordance with agreed objectives for the **planned preventative maintenance** of property? (synthesis) (a) [1,2]
- (2) How and why do you review **influencing factors** and **guidance material** about the **planned preventative maintenance** of property? (analysis) (b) [1,2,3,4]
- (3) How and why do you prioritise the **maintenance** having regard to all the **influencing factors**? (analysis) (c)[1,2,3]
- (4) How and why do you prepare plans and schedules of **maintenance** for implementation? (application) (d) [1]
- (5) How and why do you agree plans and schedules of **maintenance** for implementation with the line manager? (evaluation) (d) [1]

O15 Plan, implement and monitor the maintenance of property

O15.2 Implement and monitor planned preventative maintenance and emergency works

Performance Criteria - this involves...

- (a) implementing the **maintenance** programme
- (b) monitoring the programme and addressing specific **resources** and performance issues and recommending appropriate action during the execution of the works
- (c) ensuring the compliance of **statutory requirements** for the **maintenance** of both **planned preventative** and emergency works
- (d) ensuring that accurate monitoring records are maintained and retained

The Range...

- [1] Maintenance:**
 - (1) scheduled and preventative;
 - (2) unscheduled and corrective;
 - (3) emergency
- [2] Planned preventative maintenance:**
 - (1) structure;
 - (2) materials;
 - (3) finishes;
 - (4) fittings;
 - (5) services;
 - (6) external works
- [3] Statutory requirements:**
 - (1) testing;
 - (2) examination;
 - (3) inspection;
 - (4) certification;
 - (5) health and safety
- [4] Resources:**
 - (1) materials;
 - (2) plant and equipment;
 - (3) finance;
 - (4) time;
 - (5) personnel

O15 Plan, implement and monitor the maintenance of property

O15.2 Implement and monitor planned preventative maintenance and emergency works

knowledge and understanding

- (1) How do you implement the **maintenance** programme? (application) (a) [1]
- (2) How and why do you monitor the programme and address specific **resources** and performance issues? (analysis) (b) [4]
- (3) How and why do you recommend appropriate action during the execution of the works? (synthesis) (b)[4]
- (4) How do you ensure the compliance of **statutory requirements** for the **maintenance** of both **planned preventative** and emergency works? (application) (c) [1,2,3]
- (5) How do you ensure that accurate monitoring records are maintained and retained? (application)(d) [2,3,4]

Surveying, Property & Maintenance

The Unit:

/O17 Progress property disposals

The Standards that are part of this Unit

/O17.1 Identify and agree client's requirements

/O17.2 Prepare individual properties for disposal

/O17.3 Promote the disposal of properties

The Unit Commentary

The unit is about the selling of property either as an agent or for an employer and includes the methods of sale and marketing, production of detail sheets and other marketing material, dealing with buyers and offers and negotiating a sale

Changes to element 17.2 performance criteria and knowledge

O17 Progress property disposals

O17.1 Identify and agree client's requirements

Performance Criteria - this involves...

- (a) acknowledging and confirming **clients** instructions
- (b) clarifying, agreeing and recording **clients** detailed requirements
- (c) reviewing the current market conditions and advising **clients** and recommending on **methods of disposal** which are likely to achieve the **client's** objectives on the best terms available
- (d) advising and recommending **marketing methods** appropriate for the property, market conditions and budget
- (e) advising the **clients** of the process and likely timescale for implementing and completing a disposal and of any statutory obligations necessary to effect the disposal
- (f) agreeing with the **clients** suitable **marketing methods** to promote the property and dates and methods to review progress
- (g) identifying other potential actions which the **clients** might take to promote the disposal of the property

The Range...

- [1] Clients:**
 - (1) public;
 - (2) private
- [2] Methods of disposal:**
 - (1) sales;
 - (2) surrenders;
 - (3) lettings;
 - (4) licences
- [3] Marketing methods:**
 - (1) brochures;
 - (2) media advertising;
 - (3) promotions and events;
 - (4) internet

O17 Progress property disposals

O17.1 Identify and agree client's requirements

knowledge and understanding

- (1) What do you identify as potential actions which **clients** might take to promote the disposal of the property? (understanding) (g) [1]
- (2) How do you acknowledge and confirm the **client's** instructions? (application) (a) [1]
- (3) How and why do you clarify and agree the **client's** detailed requirements? (evaluation) (b) [1]
- (4) How do you record the **client's** detailed requirements? (application) (b)[1]
- (5) How and why do you review the current market conditions? (synthesis) (c) [1,2]
- (6) How and why do you advise the **clients** on methods of disposal which are likely to achieve the **client's** objectives? (synthesis) (c) [1,2]
- (7) How and why do you advise and recommend **marketing methods** appropriate for the property, market conditions and budget? (synthesis) (d) [1,2]
- (8) How and why do you advise the **client** of the process and timescale for implementing and completing a disposal and of any statutory obligations necessary to effect the disposal? (synthesis) (e)[1,2,3]
- (9) How and why do you agree with the **clients** suitable **marketing methods** to promote the property and dates and methods to review progress? (evaluation) (f) [1,3]

O17 Progress property disposals

O17.2 Prepare individual properties for disposal

Performance Criteria - this involves...

- (a) **recording** relevant and accurate **property details** and agreeing them with the client
- (b) advising the client on keeping, removing or replacing items at the **property** to show it to its best advantage and recommending any issues that need to be rectified to achieve a successful disposal
- (c) agreeing and producing suitable sales and promotional information about the **property** which is appropriate to the type of transaction, which conforms with legal requirements and which is likely to attract potential buyers
- (d) preparing and producing sales and marketing material of the **property** for distribution to interested parties and potential buyers
- (e) agreeing arrangements for inspecting the property with interested parties and advising occupiers on the actions to be taken to maintain security and to safeguard the condition of the **property**

The Range...

[1] **Property details:**

- (1) title and tenure;
- (2) location and description;
- (3) accommodation;
- (4) services and facilities;
- (5) fixtures and fittings;
- (6) consents and approvals;
- (7) **certificates**

O17 Progress property disposals

O17.2 Prepare individual properties for disposal

knowledge and understanding

- (1) How do you **record** relevant and accurate **property details**? (application) (a) [1]
- (2) How and why do you agree **property details** with the client? (evaluation) (a) [1]
- (3) How and why do you advise the **client** on keeping, removing or replacing items at the **property** to show it at the best advantage? (synthesis) (b) [1]
- (4) How and why do you agree and produce sales and promotional information about the **property** which is appropriate to the type of transaction? (evaluation) (c) [1]
- (5) How do you prepare and produce sales and marketing material of the **property** for distribution to interested parties and potential buyers? (application) (d) [1]
- (6) How and why do you advise occupiers on the actions to be taken to maintain the security and condition of the **property**? (synthesis) (e) [1]
- (7) How do you agree arrangements for inspecting the property with interested parties? (application) (e) [1]

O17.3 Promote the disposal of properties

Performance Criteria - this involves...

- (a) releasing and issuing appropriate marketing information and details of the property which are likely to meet **prospective buyer's** requirements
- (b) processing and recording all enquiries received from interested parties
- (c) contacting **prospective buyers** and occupiers and explaining the potential suitability of property to meet their requirements
- (d) obtaining feedback about suitability of property and passing the information on, promptly, to the client
- (e) arranging appointments to view and advising **prospective buyers** and occupiers
- (f) evaluating and advising the client on all offers and bids received and **assessing the buyer's ability to fund the acquisition** before taking the clients further instructions
- (g) negotiating, where necessary, with selected parties to agree terms for the disposal of the property in accordance with the clients instructions and current legal requirements
- (h) maintaining complete and accurate records relating to the disposal of the property and only disclosing information to people who have a right to have it

The Range...

[1] Prospective buyers:

- (1) public;
- (2) private

[2] Assessing a buyer's ability to fund an acquisition:

- (1) discussions with the potential purchaser;
- (2) references;
- (3) credit and covenant rating;
- (4) funding

O17.3 Promote the disposal of properties

knowledge and understanding

- (1) How do you release and issue appropriate marketing information and details of the property which is likely to meet **prospective buyer's** requirements? (application)(a)[1]
- (2) How do you process and record all enquiries received from interested parties? (application)(b)[1]
- (3) How and why do you contact **prospective buyers** and occupiers and explain the potential suitability of property to meet their requirements? (synthesis) (c)[1]
- (4) How and why do you obtain feedback about whether the property is suitable and pass the information on, promptly, to the client? (synthesis) (d) [1]
- (5) How do you arrange appointments to view and advise **prospective buyers** and occupiers? (application) (e)[1]
- (6) How and why do you evaluate and advise the client on all offers and bids received and **assess the buyer's ability to fund the acquisition** before taking the clients further instructions? (evaluation) (f)[2]
- (7) How and why do you negotiate, where necessary, with selected parties to agree terms for the disposal of the property in accordance with the clients instructions and current legal requirements? (synthesis) (g)[1,2]
- (8) How do you maintain complete and accurate records relating to the disposal of the property and only disclose information to people who have a right to have it? (application) (h)[1,2]

Surveying, Property & Maintenance

The Unit:

/O19 Contribute to the appraisal and valuation of property

The Standards that are part of this Unit

/O19.1 Prepare a valuation

/O19.2 Prepare and present appraisal and valuation reports

The Unit Commentary

The unit is about contributing to the valuation/appraisal process. This involves the gathering of comparable evidence, analysing this and applying it to the valuation/appraisal, and preparing valuation/appraisal reports, for a range of purposes, to required Red Book standards. This unit is also about having the knowledge of all valuation methods and techniques

Change to range.

O19 Contribute to the appraisal and valuation of property

O19.1 Prepare a valuation

Performance Criteria - this involves...

- (a) collating the **information** needed for the **appraisal and valuation**
- (b) confirming that the appropriate consents and permissions have been obtained prior to valuation
- (c) selecting **valuation methods and techniques** which are appropriate to the type of property and which meet the requirements of professional standards and codes of practice
- (d) taking accurate measurements and making observations which are necessary for the **appraisal and valuation** and recording them to meet agreed formats
- (e) reviewing all relevant documents to meet the requirements of the **appraisal and valuation** process
- (f) selecting evidence for assessing value which is accurate, complete and relevant
- (g) analysing all the relevant evidence and **information**, and preparing a realistic valuation which can be used to make sound and justifiable assumptions and judgments and provide advice
- (h) keeping internal records which are clear, accurate and complete, and which conform to accepted professional and statutory requirements

The Range...

- [1] Information - sources:**
 - (1) client instructions;
 - (2) statutory basis and assumptions;
 - (3) precedent case law;
 - (4) investigations (contextual, market, economic, planning, legal and regulatory factors)
- [2] Appraisal and valuation:**
 - (1) sale;
 - (2) purchase;
 - (3) letting;
 - (4) accounting;
 - (5) insurance;
 - (6) taxation
- [3] Valuation methods and techniques:**
 - (1) comparison;
 - (2) discounted cash flow;
 - (3) residual;
 - (4) investment;
 - (5) contractor's methods;
 - (6) receipts and expenditure

O19 Contribute to the appraisal and valuation of property

O19.1 Prepare a valuation

knowledge and understanding

- (1) How do you collate the **information** needed for the **appraisal and valuation**? (application) (a) [1,2]
- (2) How do you confirm that the appropriate consents and permissions have been obtained prior to valuation? (application) (b) [2]
- (3) How and why do you select **valuation methods and techniques**? (evaluation) (c) [3]
- (4) How do you take accurate measurements and make observations which are necessary for the **appraisal and valuation** and record them to meet formats? (application) (d) [2]
- (5) How and why do you review documents to meet the requirements of the **appraisal and valuation** process? (analysis) (e) [2]
- (6) How and why do you select evidence for assessing value? (evaluation) (f) [2,3]
- (7) How do you prepare a realistic assessment of value which can be used to make sound and justifiable judgments and provide advice? (application) (g) [1]
- (8) How and why do you analyse all the relevant evidence and **information**? (analysis) (g) [1]
- (9) How do you keep internal records? (application) (h) [1]

O19 Contribute to the appraisal and valuation of property

O19.2 Prepare and present appraisal and valuation reports

Performance Criteria - this involves...

- (a) preparing a complete and accurate **appraisal and valuation report** specifying the **valuation**, qualified by any **relevant factors** and which conforms to relevant codes of practice and standards
- (b) checking that the **appraisal and valuation report** is accurate, complete and meets the client's instructions
- (c) preparing a statement to justify the judgements made in arriving at the **valuation**
- (d) presenting the **report** for approval by the line manager and clarifying any questions which the client asks about the **valuation**
- (e) keeping internal records which are clear, accurate and complete, and which conform to accepted professional and statutory requirements

The Range...

[1] Appraisal and valuation:

- (1) sale;
- (2) purchase;
- (3) letting;
- (4) accounting;
- (5) insurance;
- (6) taxation

[2] Report:

- (1) legal and statutory requirement;
- (2) defined by the client

[3] Relevant factors:

- (1) condition;
- (2) specialist reports;
- (3) planning;
- (4) **energy performance of the building**

O19 Contribute to the appraisal and valuation of property

O19.2 Prepare and present appraisal and valuation reports

knowledge and understanding

- (1) How do you keep internal records? (application) (e) [1]
- (2) How do you prepare a complete and accurate **appraisal and valuation report**? (application) (a) [1,2]
- (3) How do you check that the **appraisal and valuation report** is accurate, complete and meets the client's instructions? (application) (b) [1,2]
- (4) How do you prepare a statement to justify the judgements made in arriving at the **valuation**? (application) (c) [2]
- (5) How do you present the **report** for approval by the line manager and clarify any questions which the client asks about the valuation? (application) (d) [2]
- (6) How and why do you specify the **valuation**, qualified by any **relevant factors**, which conforms to relevant codes of practice and standards? (evaluation) (a) [1,3]

Surveying, Property & Maintenance

The Unit:

/O20 Develop and implement property management plan

The Standards that are part of this Unit

/O20.1 Evaluate options and select property management objectives and plans

/O20.2 Implement the property management plan and identify asset management opportunities.

The Unit Commentary

This unit is about managing property on behalf of clients or an employer for the purpose of maximising returns to the client/employer. This area of work is diverse and can include day-to-day management of property, maintenance considerations, decisions about refurbishment/redevelopment, consideration of user requirements, forward planning for user changes/space allocation changes, compliance with environmental and legislative changes etc

Change to range – new items agreed.

O20 Develop and implement property management plan

O20.1 Evaluate options and select property management objectives and plans

Performance Criteria - this involves...

- (a) confirming and clarifying the client's instructions for the management of the property
- (b) gathering and verifying **information** from relevant sources to assist in the preparation of a **property management plan** which is consistent with the client's instructions.
- (c) evaluating and assessing the **information** obtained and preparing a draft **property management plan** for the approval of the line manager
- (d) preparing appropriate **criteria** to assess and measure the performance of the **property management plan**
- (e) presenting and recommending a realistic **property management plan** together with a rationale to support and justify the assumptions made for the approval of the line manager

The Range...

- [1] Information:**
 - (1) client's instructions;
 - (2) drawings, plans and surveys;
 - (3) legal documents;
 - (4) user requirements;
 - (5) other records
- [2] Property management plans:**
 - (1) operational;
 - (2) transactions;
 - (3) maintenance;
 - (4) redevelopment and/or refurbishment;
 - (5) quality service standards
- [3] Criteria:**
 - (1) financial;
 - (2) specific asset initiatives;
 - (3) occupancy rates;
 - (4) redevelopment;
 - (5) compliance;
 - (6) **environment and sustainability**

O20 Develop and implement property management plan

O20.1 Evaluate options and select property management objectives and plans

knowledge and understanding

- (1) How do you confirm and clarify the client's instructions for the management of the property? (application) (a)[1,2]
- (2) How do you gather and verify **information** from relevant sources? (application) (b)[1,2]
- (3) How do you assist in the preparation of a **property management plan** which is consistent with the client's instructions? (application) (b)[2]
- (4) How and why do you evaluate and assess the **information** obtained? (evaluation) (c)[1]
- (5) How and why do you prepare appropriate **criteria** to assess and measure the performance of the **property management plan**? (synthesis) (d)[2,3]
- (6) How do you present the **property management plan** together with a rationale to support and justify the assumptions made for the approval of the line manager? (application) (e)[1,2,3]

O20 Develop and implement property management plan

O20.2 Implement the property management plan and identify asset management opportunities.

Performance Criteria - this involves...

- (a) communicating the approved property market plan to all relevant parties for their information and indicating any special considerations and/or limitations
- (b) implementing proactively the property management plan in accordance with the **client's objectives**
- (c) reviewing the market needs for space and services and updating and maintaining accurate records of **user** requirements
- (d) identifying and evaluating asset management opportunities for allocating space and services which reflect market demand and **user** needs
- (e) preparing appropriate **criteria** upon which to advise and recommend implementing asset management initiatives which meet the **client's objectives**
- (f) assessing the implications of implementing asset management initiatives and making recommendations to the line manager where such opportunities are likely to add value and/or meet the **client's objectives**
- (g) implementing agreed asset management initiatives in accordance with instructions, allocating space and services to **users** to fulfil the **client's objectives**
- (h) monitoring the performance of the property management plan against the **criteria** and advising the line manager of any variations

The Range...

- [1] Client's objectives:**
 - (1) asset enhancement;
 - (2) financial considerations;
 - (3) occupational requirements;
 - (4) **environmental and sustainability;**
 - (5) legislative;
 - (6) health and safety;
 - (7) timing
- [2] Criteria:**
 - (1) financial considerations;
 - (2) specific asset initiatives;
 - (3) occupancy levels;
 - (4) redevelopment refurbishment;
 - (5) compliance issues
- [3] Users:**
 - (1) owner;
 - (2) occupier;
 - (3) tenant;
 - (4) third parties

O20 Develop and implement property management plan

O20.2 Implement the property management plan and identify asset management opportunities.

knowledge and understanding

- (1) How do you communicate the approved property management plan to the all relevant parties for their information and indicate any special considerations and/or limitations? (application) (a)[1]
- (2) How do you implement proactively the property management plan in accordance with the **client's objectives**? (application)(b)[1]
- (3) How and why do you review the market needs for space and services? (synthesis) (c)[1]
- (4) How do you update and maintain records of **user** requirements needs? (application) (c)[1]
- (5) How do you identify asset management opportunities for allocating space and services? (application) (d) [2]
- (6) How and why do you evaluate asset management opportunities for allocating space and services which reflect market demand and user needs? (evaluation) (d) [1]
- (7) How and why do you prepare appropriate **criteria** upon which to advise and recommend implementing asset management initiatives which meet the **client's objectives**? (synthesis) (e)[1,2]
- (8) How do you assess the implications of implementing asset management initiatives? (application) (f) [all]
- (9) How and why do you make recommendations to the line manager? (synthesis) (f) [1]
- (10) How do you implement agreed asset management initiatives in accordance with instructions, allocating space and services to **users** to fulfil the **client's objectives**? (application) (g)[2,3]
- (11) How and why do you monitor the performance of the property management plan against the **criteria**? (analysis) (h)[2]

