

COSBEDCL4002

Provide ethical advice, judgement and service in planning, conservation and building control



Overview

This unit concerns the giving of information and advice to a variety of people, including work colleagues and the public. It requires a familiarity with the roles, responsibilities and potential of all bodies and individuals within public, private and voluntary sectors that have a significant planning, conservation and/or building control role.

It also requires the ability to establish and maintain good contacts in order to seek specialist advice both within and outside your profession, to use information appropriately and to negotiate effectively with community and amenity groups, elected representatives, clients, applicants and officials. It also concerns the way in which you conduct your work activities – the way you make decisions, stay within the agreed standards, and develop your own skills and know-how.

You will need to be able to provide accurate information and advice in a way that is fit for purpose. You will need to be able to identify and weigh all the factors and reach a satisfactory decision. You will need to carry out your work in line with accepted standards and good practice. You will also need to take personal responsibility for your actions.

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Performance criteria

Exchange information and provide advice

You must be able to:

- P1 obtain information which is sufficiently detailed for the **purposes** for which it is to be used
- P2 provide **information and advice** which is complete, summarised accurately and is clearly relevant to the **purpose**
- P3 identify and explain the benefits and implications of adopting the **information and advice** provided
- P4 **present information and advice** using a style of communication which is appropriate to the ability, knowledge, understanding and disposition of the **people receiving information and advice**

Evaluate complex issues and generate solutions

You must be able to:

- P5 identify where complex issues exist, estimate their effects realistically and summarise the problems for the people who are affected and concerned
- P6 assess the accuracy and completeness of the **information** available and identify any significant gaps
- P7 obtain enough additional **information** to cover any gaps to enable **analysis**
- P8 request appropriate tests to collect **information** which cannot be obtained directly
- P9 consult with specialists from different technical disciplines by providing them with clear and accurate **information**
- P10 analyse and interpret the **information** and draw justifiable conclusions
- P11 use experience and clear **criteria** to apply solutions following **careful analysis of all factors**
- P12 record preferred solutions

Operate in an ethical manner

You must be able to:

- P13 make judgements and offer advice which balances the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected
- P14 take clear and unequivocal personal responsibility for personal decisions
- P15 disclose information only to those who have a legitimate right to receive it
- P16 communicate with stakeholders in a style and manner which maintains professional independence and maximises goodwill and trust
- P17 define and agree the working practices and the expectations of the

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- people involved in contracts
- P18 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**
- P19 refuse offers and contracts which are illegal and which may generate conflicts of interest
- P20 ensure **systems** protect individual and community interests and to compensate stakeholders where the advice given results in loss or damage to the stakeholder are in place

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Knowledge and understanding

Exchange information and provide advice

You need to know and understand:

- K1 how to obtain information which is sufficiently detailed for the **purposes** for which it is to be used (application)
- K2 how and why to provide **information and advice** (synthesis)
- K3 how to identify and explain the benefits and implications of adopting the **information and advice** provided (application)
- K4 how and why to **present information and advice** in a style appropriate to the **people receiving information and advice** (synthesis)

Evaluate complex issues and generate solutions

You need to know and understand:

- K5 what to identify as any significant gaps in the **information** available (understanding)
- K6 how to obtain enough additional **information** to cover any gaps to enable **analysis** (application)
- K7 how to consult with specialists from different technical disciplines (application)
- K8 how and why to assess the accuracy and completeness of the **information** (analysis)
- K9 how to request appropriate tests to collect **information** which cannot be obtained directly (application)
- K10 how and why to analyse and interpret the **information** and draw justifiable conclusions (analysis)
- K11 how to identify where complex issues exist (understanding)
- K12 how to use experience and **criteria** to apply solutions (application)
- K13 how to summarise problems for the people who are affected and concerned (application)
- K14 how and why to estimate the effects of complex issues (analysis)
- K15 how to record preferred solutions (understanding)

Operate in an ethical manner

You need to know and understand:

- K16 how and why to offer advice which balances the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected (synthesis)
- K17 how and why to make judgements which balance the needs of the client, the resources available and the needs of people in the community who are directly and indirectly affected (evaluation)
- K18 how and why to take personal responsibility for personal decisions (evaluation)
- K19 how to disclose information only to those who have a legitimate right

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- to receive it (application)
- K20 how to communicate with stakeholders in order to maintain professional independence and maximise goodwill and trust (application)
- K21 how and why to define and agree the working practices and the expectations of the people involved in contracts (evaluation)
- K22 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)
- K23 how and why to refuse offers and contracts which are illegal and which may generate conflicts of interest (evaluation)
- K24 how to ensure that **systems** are set up to protect individual and community interests and to compensate stakeholders where the advice given results in loss or damage to the stakeholder (application)

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Scope/Range

Exchange information and provide advice

- 1 Purposes:**
 - 1.1 raising awareness
 - 1.2 promoting a service
 - 1.3 implementing legislative changes
 - 1.4 encouraging debate
 - 1.5 explaining issues and procedures
 - 1.6 promulgating values
- 2 Information and advice:**
 - 2.1 sharing experience
 - 2.2 issuing instructions
 - 2.3 making decisions
 - 2.4 increasing understanding
 - 2.5 implementing a solution
 - 2.6 negotiation
 - 2.7 dispute resolution
 - 2.8 expert testimony to legal constituted bodies
- 3 Present:**
 - 3.1 orally
 - 3.2 in writing
 - 3.3 graphically
 - 3.4 electronically
- 4 People receiving information and advice:**
 - 4.1 clients and customers
 - 4.2 team members
 - 4.3 consultants and contractors
 - 4.4 members of the public
 - 4.5 other regulatory bodies

Evaluate complex issues and generate solutions

- 5 Information - sources:**
 - 5.1 experience and practice
 - 5.2 manual and electronic information systems
 - 5.3 valid objects of scientific enquiry
 - 5.4 other colleagues and specialists
- 6 Careful analysis of all factors:**
 - 6.1 information and conclusions from previous cases
 - 6.2 similarities between previous cases and the current situation
 - 6.3 the outcomes required

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- 6.4 known and anticipated limitations
- 6.5 decision making techniques
- 6.6 identify options
- 6.7 consultation with interested parties
- 7 **Criteria:**
 - 7.1 the interests of the stakeholders
 - 7.2 legal & statutory
 - 7.3 conformity with recognised good practice
 - 7.4 based on up to date information
 - 7.5 cost and benefits
 - 7.6 predicted risk

Operate in an ethical manner

- 8 **Recognised good practice:**
 - 8.1 ethical codes of practice within the occupation, discipline or organisation
 - 8.2 statute law
 - 8.3 duty of care
 - 8.4 avoiding conflicts of interest (offers which may result in adverse conditions to other individuals or the community; offers which involve the financial interest of the practitioner; giving unfair advantage to the practitioner's family or friends)
- 9 **Systems:**
 - 9.1 indemnity insurance
 - 9.2 guarantees
 - 9.3 contract conditions
 - 9.4 bonds

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