



## **NVQ Design Level 3**

### **Guidance on portfolio building**

## Introduction

This booklet sets out some ideas about what to put in your portfolio for NVQ Design, level 3.

## What is a portfolio

For NVQ Design your portfolio should consist mainly of artwork. Because the job of the portfolio is to prove what you can do and understand about design it needs to be organised carefully to match the details of the units that you need to complete.

Most artwork will show what you have done quite clearly, but may not show how you did it or why that you did it in the way that you did. So some of what you need to prove to meet the units will have to come from other kinds of evidence.

## Artwork for different design specialisms

The kind of artwork you produce will vary according to the design specialism that you work in. There are four main areas of design.

<i>Graphic design</i>	If you are designing – branding, corporate identity, packaging, design for print, design for advertising (e.g. new media and multimedia, web, the Internet and the Intranet). Your artwork will typically consist of digital printouts, freehand sketches, layouts, and mock-ups.
<i>Fashion &amp; textile design</i>	If you are designing – clothing, footwear and accessories, design for print and constructed textiles (e.g. knitting, weave and carpets). Your artwork will typically consist of 2D work, such as sketches, mood boards, design sheets, illustrations, photographs of 3D outcomes, patterns and layplans, samples and test pieces, CAD printouts, and 3D work, such as toiles, mock-ups, sample garments and lengths.
<i>Product design</i>	If you are designing – domestic products (e.g. ceramics, furniture, lighting consumer and electrical goods), crafts and industrial design. Your artwork will typically consist of 2D work, such as sketches, CAD digital printouts, design sheets, illustrations, photographs of 3D outcomes, and 3D work, such as models, mock-ups and prototypes.
<i>Spatial design</i>	If you are designing – interiors, environments, retail and exhibition (it is recognised that exhibition design may also involve graphic and product design). Your artwork will typically consist of 2D work, such as site plans and surveys, photographs, sketches, CAD printouts, design sheets, illustrations, photographs of 3D outcomes; and 3D work such as, models and mock-ups.

## Other kinds of evidence

As back up work to prove what you know and understand you will need to show other kinds of evidence in addition to your artwork. These could include:

- copies of the brief and notes you have written describing what you have to do;
- explaining your work in a discussion with your assessor (sometimes called a professional discussion);
- records of research you have carried out (e.g. about materials, equipment or other designers' work);
- video recordings of how you presented your work to the decision-maker and what they said about it;
- copies of written notes or emails with colleagues, your manager or outside people; or
- copies of letters from satisfied clients.

The most important of these will be your assessor's records. When you are assessed, your assessor will not only look at your artwork but also discuss what you did, how you did it and why you did it in the way that you did (sometimes called process evidence). If they are satisfied that you know and understand what is needed for each unit covered by the project then they will sign off. If your assessor is still not sure and asks you to produce additional evidence, then they will give you written feedback. (You can use this to make sure that your achievements are complete next time you are assessed.)

### How to plan your portfolio

Your assessor will help you to plan what to include in your portfolio – to make sure that you put in enough evidence to show what you can do and understand. Both of you need to keep the amount of evidence to a minimum, by focusing on quality not quantity.

Assessors should encourage you to keep back up evidence where it is naturally located (e.g. in your head, on a computer screen or in a filing cabinet). It is not necessary to keep copies of all evidence produce in one place, that is, in the portfolio. If this approach is used then record of assessment will only show:

- the artwork produced,
- the assessment decision, and
- where any backup evidence is located.

### Which projects to choose

With careful planning it is possible to prove your achievement through working on between two and ten projects, though this number may vary depending on your design specialisation and your choice of option units. For example, if you are working in exhibition design in any one-year period you could only be involved in one major project (from winning the brief to starting work on the installation) and a number of unsuccessful pitches; if you are working on website design over a one year period you could have worked on several different small-scale projects each week, with a larger project every now and again.

Whether you are working 'in-house' or within specialist design practices, you are likely to undertake two main roles:

- 1 contributing to managing the design service; and
- 2 using the design cycle or process to respond to client briefs.

Different types of work will provide evidence for different units. The table below shows which units and elements are most likely to be covered from these two types of work and from day-to-day work in your design practice.

<i>Projects where you were mainly</i>	<i>Will usually give evidence for the following units</i>
Contributing to managing the design service (planning and managing resources, such as costs, time, roles, materials and equipment; and promoting and selling design work)	Core – 3M Optional – 3P.1, 3R.1, S, F.2
Using the design cycle or process (developing ideas and solutions to meet a client brief)	Core – 31, 32, 33 and 34 Optional – 3P.2, 3R.2 and F.3
Going about your daily work and keeping up-to-date with what other people are doing (in your job in a design consultancy, as a freelance or on a work placement)	Core – 3D and W Optional – F.1

Your assessor will give you advice about which projects are most suitable.

## 31 Clarify briefs and research information (Core)

### Unit summary

This unit is about researching information and ideas to help clarify the client brief for the project. It is likely that the design concept for the project will be agreed with any others involved in the project. Your research and ideas origination should be to a professional standard and based on any agreed design concept. Some of the working methods and techniques that you use will vary according to your design specialism.

### How you can prove this

For this unit you will need to organise a portfolio of work to show how you responded to a range of real work projects. These projects may be undertaken as part of your role in your work place, or set by an external client and undertaken in your assessment centre.

Your project portfolio of design development work should include written and visual records of research and ideas for each project. The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. When choosing the projects you need to make sure that you show the whole range of design media, techniques and technology that you can work with, when generating early ideas. Some of the project work you choose may also be submitted for units 32, 33, 34 and 3D.

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### How to show you can identify and evaluate information relevant to design briefs [31.1]

For this section you need to organise the work in your portfolio to show your understanding of the:

- 1 design development needs of the client,
- 2 expectations of the decision-maker,
- 3 needs of target users,
- 4 limitations and constraints of the brief, and
- 5 technical, legal and regulatory requirements for realisation of the final design.

#### *Examples of how to prove what you understand and can do*

- Copies of any written design briefs or instructions.
- Notes that you took about discussions and meetings you had with the decision-maker and any other people involved when agreeing an approach to the project (get the people involved to sign your notes to say that they are accurate).
- Visual images you collected to show the needs of target users (eg mood boards or customer profiles).
- Copies or information you identified about the target market (eg market research reports or reports from the client).
- Copies of information you gathered about laws or other regulations that affect the design (eg printouts from websites or handouts from professional bodies).
- Copies of information technical limitations (eg leaflets from manufacturers or other suppliers).
- A discussion with your assessor about your understanding of your research results.

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**How to show you can explore and select visual sources, materials and techniques relevant to the design context [31.2]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the history of the product you are working on and competitive products,
- 2 the context in which the product is seen, used or interacted with,
- 3 other contextual information related to the design work, and
- 4 primary and secondary sources.

*Examples of how to prove what you understand and can do*

- A collection of visual references you identified, annotated to explain what was relevant and where it came from (eg sketchbooks, photographs, plans, collage boards or printouts).
- Copies of visuals you used for presenting your research and a copy of any notes about what you needed to say and any feedback you received. (Get the people involved to sign your notes to confirm what they thought about the effectiveness of your research and the way that you presented it.)
- A discussion with your assessor about your understanding of your research results.
- Records of information gained from interviews, informal discussions, meetings or visits (get the people involved to sign your records to say that they are accurate).

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**How to show you can originate ideas to meet project briefs [31.3]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the design objectives for the project,
- 2 how research results influenced the evolution of your ideas,
- 3 how others' feedback influenced your work, and
- 4 the use of design media, techniques and technology.

You must also show your ability to present and explain ideas to the decision-maker and others involved, and evaluate ideas against the agreed design objectives.

*Examples of how to prove what you understand and can do*

- Artwork showing where your ideas came from and how they evolved.
- Notes identifying which visuals you used for presenting your ideas, what you thought about them and any feedback you received. (Get the people involved to sign your notes to confirm what they thought about your ideas and the way you presented them.)
- A discussion with your assessor about how your research results influenced the ideas you generated.
- Records of informal discussions, meetings or visits showing you can get on and work effectively with other people (get the people involved to sign your records to say that they are accurate).

## 32 Develop alternative design ideas using materials, processes and technology (Core)

### Unit summary

This unit is about exploring and communicating design ideas. This involves thinking, drawing and working with materials, technology and equipment. The techniques and processes that you use will vary according to your design specialism. The ideas that you develop need to be produced to a professional standard and match the client brief.

### How you can prove this

For this unit you will need to organise a portfolio of work to show how you responded to a range of real work projects. These projects may be undertaken as part of your role in your work place, or set by an external client and undertaken in your assessment centre.

It is important that your project portfolio of design development work illustrates the breadth of techniques and skills you have in using visual media, materials, processes and technology. The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. If you are working in a design practice that only carries out a limited type of design work, it is acceptable to include examples of design development work that you have undertaken in your own time. When choosing the projects you need to make sure that you show versatility, the breadth of your technique and capability in the use of visual media, materials, processes and technology. You also need to make sure that you show your ability to communicate both 2D and 3D ideas. Some of the project work you choose may also be submitted for units 31, 33, 34 and 3D.

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### How to show you can explore and exploit the potential of suitable materials and processes [32.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 ideas in terms of the agreed design concept, visual research and client brief,
- 2 materials,
- 3 processes,
- 4 tests to analyse suitability (e.g. against any design specification or functional specification and for final realisation), and
- 5 the criteria and techniques you used to select materials and processes suitable for the design purpose.

#### *Examples of how to prove what you understand and can do*

- Alternative developing ideas presented in a way that makes it easy to see how you explored materials and processes and why your ideas changed and were refined. Your ideas should be presented in the way that is most common for your design specialism (eg design sheets, sketchbooks, samples, test pieces, models or printouts).
- Records of the materials and processes you explored to see if they were suitable for realising your final design.
- Notes on the results of the evaluation and testing of alternative materials and processes.
- A discussion with your assessor about the potential and limitations of the materials and processes you explored and considered.
- Notes on your reasons for rejecting or developing ideas. (Where you were given feedback about your ideas, get the people involved to sign your notes to confirm they are accurate.)

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**How to show you can explore and exploit the potential of suitable technology and equipment [32.2]**

For this section you need to organise the work in your portfolio to show your understanding, evaluation and use of at least two types of technology (or equipment or technical processes) that are used in design development.

You must include a comparison of at least three of the following factors:

- 1 cost in use,
- 2 availability,
- 3 performance,
- 4 skills required for operation,
- 5 safety in operation, or
- 6 environmental impact.

*Examples of how to prove what you understand and can do*

- Developing ideas presented in a way that makes it easy to see how you explored alternative types of technologies and why your ideas changed and were refined. Your ideas should be presented in the way that is most common for your design specialism (eg design sheets, sketchbooks, samples, test pieces, models or printouts).
- Records of the comparisons you made of tools, equipment, technology or technical processes to see if they were suitable for realising the final design.
- Notes on the results of evaluating and testing alternative technologies.
- A witness statement of your ability to observe relevant healthy and safe working practices.
- A discussion with your assessor about the potential and limitations of the technologies you explored and evaluated.
- Notes on your reasons for rejecting or developing ideas. (Where you were given feedback about your ideas get the people involved to sign your notes to confirm they are accurate.)

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**How to show you can explore and communicate alternative design ideas using appropriate visual media [32.3]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 how to communicate design 2D and 3D ideas to non-designers
- 2 formal elements, and
- 3 the criteria used to evaluate ideas with others against the design brief.

You must also include examples of how you used at least three of the following types of visual media:

- 1 technical drawing,
- 2 freehand sketching,
- 3 illustration,
- 4 digital drawing or imaging,
- 5 CAD,
- 6 film or video, and
- 7 samples, models or prototypes.

*Examples of how to prove what you understand and can do*

- Developing ideas presented in a way that is most common for your design specialism (eg design sheets, sketchbooks, samples, models or printouts).
- A discussion with your assessor about your understanding of formal elements and the criteria used to evaluate your designs.

## 33 Develop and present suitable design responses (Core)

### Unit summary

This unit is about creating a professional response to a design brief. This involves selecting and developing options that meet the client brief, presenting these to the client and agreeing any amendments to be incorporated in the final design proposal. The designs that you work on may be your own or originally created by colleagues.

### How you can prove this

For this unit you will need to organise a portfolio of work to show how you responded to a range of real work projects. These projects may be undertaken as part of your role in your work place, or set by an external client and undertaken in your assessment centre.

The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. When choosing your projects you need to make sure that you show designs, development work, evaluations and planning for a range of projects. These may be your own or others' design ideas. Some of the work should show the progression from initial research, exploration and selection of ideas to the development of chosen options. You also need to show how you used suitable media, techniques and technology to prepare and present visual interpretations of designs and supporting information. Some of the project work you choose may also be submitted for units 31, 32 and 34.

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### How to show you can evaluate design ideas against the brief [33.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the reasons behind the selection of evaluation criteria and techniques,
- 2 the evidence on which evaluation findings were based, and
- 3 the factors that lead to any modifications.

#### *Examples of how to prove what you understand and can do*

- Copies of the designs and the client brief against which they were evaluated.
- Records of the evaluation techniques used and the results obtained.
- A discussion with your assessor about your understanding of the criteria, standards and constraints relevant to the designs and why any modifications were necessary.
- Notes of meetings and work groups about evaluating ideas (get others involved to sign your notes to confirm they are accurate).

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### How to show you can produce design visuals and supporting information [33.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 how prepare a visual interpretation that shows that each design option meets the requirements of the brief,
- 2 the key design features and realisation options that need to be communicated to the client, and
- 3 how to produce work within agreed timescales and budgets.

#### *Examples of how to prove what you understand and can do*

- Visual interpretations of design options and supporting written information, that helps to explain them to the client. The visuals should be presented in a way that is common for your specialism (e.g. visuals, plans, working drawings, models, prototypes or samples)
- A discussion with your assessor about the communication methods you used, explaining why you chose to communicate them in the way that you did and the key features and benefits of the designs.
- Notes on discussions and meetings with decision-maker and others involved about agreeing the form of the visual presentation, the timescales and budget for the work. (Get the people involved to sign your notes to confirm they are accurate.)

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### **How to show you can present design options [33.3]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 your role in the presentation,
- 2 the objectives and results of the presentation, and
- 3 alternative presentation formats.

#### *Examples of how to prove what you understand and can do*

- Copies of visuals you used for presenting the design options, a copy of any notes about what you needed to say and any feedback you received from the client. (Get the people involved to sign your notes to confirm what they thought about the effectiveness your presentation skills.)
- Notes on modifications agreed during the presentation (get the people involved to sign them to confirm their accuracy).
- A discussion with your assessor about your understanding of the presentation objectives and results of the meeting.

## 34 Produce and present detailed design proposals (Core)

### Unit summary

This unit is about preparing a final design proposal and detailed information about the design realisation process and presenting it to the client. This involves preparing visual artwork and technical information for presentation, and taking a key role in presenting the proposal to the client. Some of the working methods and techniques that you use will vary according to your design specialism.

### How you can prove this

For this unit you will need to organise a portfolio of work to show how you responded to a range of real work projects. These projects may be undertaken as part of your role in your work place, or set by an external client and undertaken in your assessment centre.

The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. When choosing your projects you need to make sure that you show the evolution of ideas from initial research through to final detailed design proposal, that will enable the final design or design product to be produced, realised, installed or replicated. You also need to show how the final proposal was planned and your part in the planning process. Some of the project work you choose may also be submitted for units 31, 32 and 33.

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### How to show you can prepare finished designs [34.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the quality standards you need to meet for your own contribution,
- 2 where any others were involved in the project and how your work links with their contributions, and
- 3 professional standards of planning and behaviour.

#### *Examples of how to prove what you understand and can do*

- Final design visuals, produced to a professional standard and presented in a way that is common for your specialism (e.g. visuals, plans, working drawings, models, prototypes or samples).
- Notes on agreements reached over content, format of final design visuals and deadlines for producing them.
- A discussion with your assessor about your finished designs, and where appropriate how they relate to any contributions that others have made.
- A witness statement from the decision-maker or others involved confirming that you have met professional standards of behaviour.

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### How to show you can research and prepare information to support design realisation [34.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the function of technical information prepared,
- 2 the proposed design realisation requirements and processes, and
- 3 any amendments to the brief.

#### *Examples of how to prove what you understand and can do*

- Copies of technical information you produced for the realisation of designs, presented in the way that is common for your specialism (e.g. a technical specification, a production specification).
- Notes on the information gathered about production, realisation, installation or replication processes.
- A discussion with your assessor about your understanding of the realisation processes to be used and the reasons for any amendments that needed to be made to the design brief, in order for the realisation to proceed smoothly.

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### **How to show you can present design and proposed realisation process [34.3]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the objectives and format of the presentation,
- 2 alternative presentation media, techniques and technology,
- 3 your role in relation to any others involved, and
- 4 the results of the presentation meeting and reasons for any agreed amendments.

#### *Examples of how to prove what you understand and can do*

- Copies of materials you used for presenting the final design, a copy of any notes about what you needed to say and any feedback you received from the client. (Get the people involved to sign your notes to confirm what they thought about the effectiveness your presentation skills.)
- Notes on objectives and results agreed during the presentation meeting (get the people involved to sign them to confirm their accuracy).
- A discussion with your assessor about your understanding of alternative presentation methods; and for each project, the presentation objectives and results of the meeting.

## 3D Research design trends and developments in materials and technology (Core)

### Unit summary

This unit is about the analytical and practical skills needed to keep up-to-date with developments in design, materials, techniques and technology. By finding out about developments you can see how they may affect particular projects, for example new materials that may be suitable for the product or trends that may influence the visual appeal of the design, or developments in software and communications technology. These skills will support your design work and enable you to offer an effective service to clients in your specialism.

### How you can prove this

For this unit you will need to produce:

- a portfolio of exploration, wide ranging research and analysis carried out in response to a range of real work projects that have been undertaken by yourself or others; and
- evidence of your performance at work over a period of time.

The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. Some of the work you choose may also be submitted for units 31 and 32.

### How to show you can identify and explore design trends and developments [3D.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 cultural and historical trends,
- 2 design opportunities, and
- 3 technical, operational or market developments.

#### *Examples of how to prove what you understand and can do*

- Results of your exploration into design trends and developments.
- Notes on significant information and references gathered (that is, what you found out and where you found it).
- Three observations of your attempts to keep up-to-date over approximately six months.
- A discussion with your assessor about your understanding of design trends and developments.
- Copies of visuals and any handouts for presentations, notes about what to say and any feedback received. (Get those involved to sign your notes to confirm your ability to report orally and discuss your research findings.)
- A copy of any written reports, including details of the sources of information.

The observations, presentation and reports may be the same as or different from those undertaken to prove your abilities for 3D.2 and 3D.3.

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### How to show you can identify and explore availability and developments in materials [3D.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the properties, uses and availability of materials,
- 2 the reasons for selecting research and practical investigation techniques, and
- 3 the suitability of materials developments for use in day-to-day design work and for particular projects. (In other words developments that may be useful to know about in general and developments that you found out about when working on a specific brief.)

#### *Examples of how to prove what you understand and can do*

- Results of exploration into materials developments for design work and final design realisation.
- Notes on significant information and references you gathered.
- Three observations of your attempts to keep up-to-date over approximately six months.
- A discussion with your assessor about your understanding of materials availability and developments.
- Copies of visuals and any handouts for presentations, notes about what to say and any feedback received. (Get those involved to sign your notes to confirm your ability to report orally and discuss your research findings.)
- A copy of any written reports, including details of the sources of information.

The observations, presentation and reports may be the same as or different from those undertaken to prove your abilities for 3D.1 and 3D.3.

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### How to show you can identify and explore developments in design technologies [3D.3]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the reasons behind your choice of research and practical investigation techniques
- 2 the capabilities, features, benefits and limitations of design technologies
- 3 their suitability for use in day-to-day design work and for particular projects.

It should include comparison of a range of:

- 1 both existing design technologies, and
- 2 modifications, upgrades and new developments in design technologies.

#### *Examples of how to prove what you understand and can do*

- Results of exploration into new technology for design work and final design realisation.
- Notes on significant information and references you gathered.
- Three observations of your attempts to keep up-to-date over approximately six months.
- A discussion with your assessor about your understanding of developments in design technologies.
- Copies of visuals and any handouts for presentations, notes about what to say and any feedback received. (Get those involved to sign your notes to confirm your ability to report orally and discuss your research findings.)
- A copy of any written reports, including details of the sources of information.

The observations, presentation and reports may be the same as or different from those undertaken to prove your abilities for 3D.2 and 3D.3.

## 3M Plan and manage design work (Optional)

### Unit summary

This unit is about the process of design project management. Project management involves considering any limitations that may affect how well you are able to respond to a new project, working out what skills, materials and equipment will be needed and planning and monitoring progress. It also involves evaluating the effectiveness of the project management in ensuring that a good design service was provided to the client.

### How you can prove this

To achieve this unit you will need to produce:

- a portfolio of evidence drawn from a range of real work projects you have undertaken, and
- evidence of your performance at work over a period of time helping to manage design projects. This may be in a relevant job role or through day release or other design related work experience.

The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. Some of the work you choose may also be submitted for units 31, 32, 33 and 34.

### How to show you can identify factors that may affect the design service [3M.1]

When planning what to put in your portfolio you must include evidence of your exploration of:

- 1 short-term factors, and
- 2 long-term factors affecting the design service.

For this section you need to organise the work in your portfolio to show your understanding of:

- 3 factors that may affect the efficiency and effectiveness of the design response to a new project, and
- 4 how to predict potential problems associated with skills, time, costs and the law.

#### *Examples of how to prove what you understand and can do*

- Notes on significant factors that you identified related your own and others' experience of similar previous design work.
- Observation by the assessor of your day-to-day professional conduct within the design practice.
- A discussion with your assessor about your understanding of the factors likely to affect design service for particular projects.

### How to show you can identify resource requirements for projects [3M.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 your own role and responsibilities in relation to identifying resource requirements,
- 2 estimating time and resource requirements, and
- 3 costing design developments.

#### *Examples of how to prove what you understand and can do*

- Background information about your agreed role and responsibilities for each project.
- Copies of estimates you contributed to about personnel, physical resources and costs.
- Observation by the assessor of your day-to-day professional conduct within the design team.
- Notes from meetings with the decision-maker and others involved about people, physical resources and costs (get others involved to sign your notes to confirm they are accurate).
- A discussion with your assessor about your understanding of estimations you made and the results you obtained.

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### **How to show you can plan and monitor progress in meeting design objectives [3M.3]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 preparing a design development timetable,
- 2 your own role and responsibilities within the work programme,
- 3 the reasons for any changes or amendments made to the schedule,
- 4 the monitoring techniques used, and
- 5 the consequences of any potential difficulties.

#### *Examples of how to prove what you understand and can do*

- Copies of plans, annotated to show any changes made to the schedule and actions taken in response to unforeseen difficulties.
- Notes on any feedback received about planning decisions (get those involved to sign your notes to confirm they are accurate).
- Records of monitoring or progress notes (e.g. emails or notes from progress meetings).
- Observation by the assessor of your day-to-day professional conduct within the design practice.
- A discussion with your assessor about your understanding of the planning and monitoring processes used and how you responded to any unforeseen difficulties.

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### **How to show you can evaluate design service provided to clients [3M.4]**

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 project requirements, design and business objectives,
- 2 strengths and weaknesses of the design service, and
- 3 how your own response could be improved and any personal development needs.

#### *Examples of how to prove what you understand and can do*

- Observation by the assessor of your day-to-day professional conduct within the design practice.
- A discussion with your assessor about your understanding of the evaluation criteria used.
- Notes from meetings evaluating the design service, such as team meetings or project debriefing sessions (get those involved to confirm that your notes on your contribution to the evaluation process are accurate).
- A self evaluation of your performance.
- Notes about the feedback you received in individual appraisal sessions and any agreements reached about your personal development needs.

## **W Create and maintain safe and effective working relationships (Core)**

### **Unit summary**

This unit is about developing and maintaining good working relationships. You will need to be able to work effectively with others in your organisation and promote effective relationships with people outside your organisation such as clients, suppliers, freelancers and sub-contractors. Successful working relationships play a significant part in ensuring business effectiveness. You will also need to understand and apply safe and healthy working practices.

### **How you can prove this**

For this unit you will need to produce evidence of your performance in the design practice you work in over an extended period of time, working with colleagues, clients and other external agents. This may be in a relevant job role or through day release or other design related work experience.

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### **How to show you can develop and maintain effective working relationships with colleagues [W.1]**

For this section you must show:

- 1 how you collaborated with colleagues, and
- 2 your understanding of how to develop relationships with decision-makers and colleagues.

#### *Examples of how to prove what you understand and can do*

- Notes from meetings with people you work with day to day. (Get the people involved to sign your notes to confirm they are accurate.)
- Copies of any written communication with decision-maker, colleagues and those outside the design practice (e.g. emails, faxes, letters or memos).
- Observation by the assessor of your day-to-day professional conduct within the design practice.
- A witness statement from the decision-maker or others involved confirming your contribution to the design practice in terms of behaviours, attitudes and actions
- A discussion with your assessor about your understanding of your role and responsibilities.

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### **How to show you can develop and maintain effective working relationships with clients and other external agents [W.2]**

For this section you must show:

- 1 how you collaborated with clients and external agents, and
- 2 your understanding of the role you can play in promoting relationships outside the design practice with clients and a variety of external agents.

#### *Examples of how to prove what you understand and can do*

- Notes from meetings with clients and any other external people. (Get the people involved to sign your notes to confirm they are accurate.)
- Copies of any written communication with clients and those outside the design practice (e.g. emails, faxes, letters or memos).
- A witness statement from the decision-maker or others involved confirming your contribution to maintaining effective relationships with clients and any other external agents.
- Observation by the assessor of your professional conduct with clients or those outside the design practice.
- A discussion with your assessor about your understanding of the way your role and responsibilities impact on effective external relationships.

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### How to show you can apply safe and healthy working practices [W.3]

For this section you must show:

- 1 how you met current legislation, regulations and any organisational guidelines (e.g. codes of professional conduct or 'dos and don'ts' lists for working with clients),
- 2 the schedules and procedures for maintenance and use of equipment you followed,
- 3 the health and safety information about materials and equipment you obtained, and
- 4 how you avoided risks and hazards in your own work.

#### *Examples of how to prove what you understand and can do*

- Copies of information about health and safety you gathered.
- Observation by the assessor of your meeting health and safety regulations.
- A discussion with your assessor about your understanding of how to ensure that what you do and what you design meets health and safety regulations and procedures.
- A witness statement from relevant people confirming your contribution to maintaining a healthy and safe working environment.

## 3P Realise design prototypes (Optional)

### Unit summary

This unit is about the realisation of 2D and 3D prototypes, models, mock-ups, samples or test pieces using small-scale realisation techniques. Designers need to understand how their final design will be made, function and perform to check that their ideas will work in practice and be suitable for the client. Prototypes may be made at any stage of the design development cycle.

### How you can prove this

For this unit you will need to produce a portfolio of work in response to a range of real work projects you have undertaken. These projects may be undertaken as part of your role in your work place, or set by an external client and undertaken in your assessment centre. The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do. When choosing the projects you need to include evidence of the kinds of 2D or 3D prototypes that are common in your specialism (e.g. models, maquettes, test pieces, samples or mock-ups).

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### How to show you can plan and monitor realisation processes [3P.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the agreed aims and deadlines,
- 2 how to plan the small-scale realisation process,
- 3 how to monitor the realisation process to check that the prototype will give you the information you need about the design, and
- 4 alternative strategies for overcoming any potential problems.

#### *Examples of how to prove what you understand and can do*

- Notes about the aims and objectives for producing a prototype agreed with others involved. In other words answering questions like – how will it look? will it work? will people like it? will it help the client to make their mind up about the design? can it be made in the way that you planned?. (Get others involved to sign your notes to confirm they are accurate.)
- Plans giving details of the stages of work, deadlines and monitoring points, annotated to show any changes or modifications resulting from unforeseen problems.
- A discussion with your assessor about your understanding of the planning and monitoring of small-scale realisation projects to meet aims and deadlines, and ways to overcome any unforeseen problems.

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### How to show you can realise and evaluate prototypes [3P.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the small-scale use of materials, techniques and processes,
- 2 health and safety, and
- 3 the potential and limitations of evaluation techniques.

You must also show that you are able to realise and test prototypes and report on their suitability in meeting design objectives and client requirements.

#### *Examples of how to prove what you understand and can do*

- Complete or incomplete prototypes that you have realised.
- Notes on evaluations and tests you have carried out, the results obtained and the conclusions that you have drawn.
- A discussion with your assessor about your understanding of small-scale realisation processes and evaluation techniques.
- A witness statement from the decision-maker or others involved confirming your ability to report on the suitability of prototypes.

## 3R Plan and contribute to the realisation of final design product(s) (Optional)

### Unit summary

This unit is about the realisation or installation of the final design product (such as an interior or exhibition design installation or the commercial production of a product design). This involves planning and scheduling the tasks and resources required and working with others to realise the final design product(s) to a satisfactory standard of completion.

### How you can prove this

For this unit you will need to produce evidence of your role in the final realisation of a range of real work projects that you have been involved with. The projects you include need to be chosen carefully to make sure that you have enough evidence to show what you understand and can do.

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### How to show you can plan and agree final realisation process [3R.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the constraints, skills requirements and timings for realising final designs,
- 2 the use of planning tools,
- 3 how to schedule final design realisation work to meet design objectives and deadlines
- 4 how to identify any contributions needed from external agents, and
- 5 how to communicate plans and recommendations.

#### *Examples of how to prove what you understand and can do*

- Copies of specifications for final realisation projects
- Plans giving details of the stages of work and deadlines, annotated to show any changes or modifications resulting from unforeseen problems.
- Notes on discussions and meetings about planning the realisation of final designs. (Get the people involved to sign your notes to confirm they are accurate.)
- A witness statement from the decision-maker or others involved confirming your ability to:
  - identify constraints, skills requirements and timings,
  - organise resources, and
  - communicate recommendations to those involved at appropriate stages.
- A discussion with your assessor about your understanding of planning final design realisation processes.

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### How to show you can work with others to realise final design product(s) [3R.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 the techniques and processes undertaken,
- 2 monitoring techniques,
- 3 responses to potential or actual problems, and
- 4 hand-over procedures.

#### *Examples of how to prove what you understand and can do*

- A witness statement from the decision-maker or others involved confirming your ability to work with others to realise final designs.
- Notes of discussions or meetings about the progress of final realisation work and how to solve any problems involved. (Get the people involved to sign your notes to confirm they are accurate.)
- Notes on potential problems and actual problems and the responses that you or others made (e.g. events related to the involvement of external agents, changes to plans or working methods).
- Notes you made for the client about the hand-over.

- Observation by the assessor of your contribution to the realisation of final design product(s).
- A discussion with your assessor about your understanding of realisation processes and monitoring techniques.

## F Undertake freelance work (Optional)

### Unit summary

This unit is about undertaking freelance work either within a larger design organisation or on your own premises. Working as a freelancer involves understanding how to manage your own employment path and financial affairs and being able to quickly pick up on the demands of new projects and working situations. To be a successful freelancer you will need to be assertive, flexible and able to cope with the unexpected.

### How you can prove this

For this unit you will need to produce evidence of your role in preparing and undertaking freelance work over an extended period of time.

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### How you can show you can prepare for freelance work [F.1]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 keeping accounts,
- 2 setting up systems for purchase orders, invoicing, filing and chasing late payments,
- 3 making, following up and maintaining contacts with potential employers/clients, and
- 4 building personal networks.

#### *Examples of how to prove what you understand and can do*

- Records of preparing for freelance work including:
  - extracts from your systems of accounting and personal administration,
  - a personal statement outlining your vision (sometimes called a mission statement) and describing your potential client base,
  - copies of promotional material,
  - calculations of fees or job prices in relation to market forces, and
  - information about contacts and sources of advice.
- Notes from discussions and meetings with professional advisers. (Get the people involved to sign your notes to confirm they are accurate.)
- Copies of written communications with professional advisers (e.g. emails, letters or faxes).
- A discussion with your assessor about your understanding of business and professional practices.

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### How to show you can handle freelance contracts [F.2]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 negotiating contract terms and conditions,
- 2 estimating time requirements for design work or jobs,
- 3 work scheduling and contingency planning,
- 4 calculating fee rates or pricing jobs,
- 5 the importance of advance planning, and
- 6 the difference between creative-led and business-led decision making.

#### *Examples of how to prove what you understand and can do*

- Copies of contracts you have negotiated.
- Notes on discussions and meetings with the decision-maker or others about negotiating contracts. (Get the people involved to sign your notes to confirm they are accurate.)
- Plans and work schedules (e.g. time sheets, work logs or diaries).
- A discussion with your assessor about your understanding of contracts, time management and planning.

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### How to show you can carry out freelance work to meet agreed contracts [F.3]

For this section you need to organise the work in your portfolio to show your understanding of:

- 1 how to adapt your behaviour to suit the work situation,
- 2 using your own or your employing organisations resources,
- 3 maintaining professional standards of behaviour and work,
- 4 how to maintain your own direction and focus and deal with stress,
- 5 professional ethics and practices,
- 6 other organisational cultures and ways of working, and
- 7 if using your own resources – budgeting for resources and overheads.

#### *Examples of how to prove what you understand and can do*

- Design outcomes produced.
- Copies of written communication with the employing organisation (e.g. emails, faxes, letters, briefs).
- Notes on discussions or meetings with the decision-maker or employing organisation. (Get the people involved to sign your notes to confirm they are accurate.)
- A witness statement from confirming your ability to undertake freelance work to a professional standard.
- Observation by the assessor of your professional conduct providing freelance design services.
- A discussion with your assessor about your understanding of the requirements, working practices and professional standards involved in freelance working.

## S Sell and promote designs and design services (Optional)

### Unit summary

This unit is about selling designs to clients or customers and promoting design work to increase the client or customer base. This involves negotiating with clients or customers, preparing and presenting proposals and quotations and closing sales, analysing market opportunities and making recommendations about how best to promote designs and design services.

### How you can prove this

For this unit you will need to produce evidence of your role in contributing to selling and marketing of designs and design services in the design practice you are working in over an extended period of time. The work that you include needs to be chosen carefully to make sure that you have enough evidence to show what you understand and can do.

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### How to show you can negotiate sales [S.1]

For this section you need to demonstrate your performance in:

- 1 negotiating and liaising with clients,
- 2 encouraging clients to commit themselves to an agreement,
- 3 modifying proposals during negotiation, and
- 4 communicating and recording agreements.

You must also show your understanding of organisational, legal and regulatory requirements.

#### *Examples of how to prove what you understand and can do*

- Copies of agreements and records related to sales, showing any amendments agreed.
- Observation by the assessor of your professional conduct in negotiating sales with clients.
- A series of witness statements from the people involved confirming your ability to negotiate sales efficiently and effectively (e.g. the client, your line manager or colleagues).
- A discussion with your assessor about your understanding of the parameters for key variables and organisational, legal and regulatory requirements effecting the negotiations.

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### How to show you can prepare and present proposals and quotations [S.2]

For this section you need to demonstrate your performance in:

- 1 identifying and clarifying client requirements,
- 2 drafting proposals and quotations in line with client, organisational, legal and regulatory requirements, and
- 3 presenting proposals and quotations.

You must also show your understanding of the client's main requirements and the conditions and constraints required to protect the design practice.

#### *Examples of how to prove what you understand and can do*

- Copies of drafts and final proposals and quotations you have prepared.
- Copies of any written communication about the proposals and quotations (e.g. emails, faxes, letters).
- A discussion with your assessor about your understanding of the client's main requirements, and the conditions and constraints required to protect the design organisation.
- A series of witness statements from the people involved confirming your ability to prepare and present proposals and quotations accurately and efficiently (e.g. from clients, your line manager or colleagues).

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### **How to show you can make recommendations for promoting designs and design services [S.3]**

For this section you need to demonstrate your performance in:

- 1 obtaining and analysing market information to support decision making, and
- 2 making recommendations about at least two promotional methods.

You must also show your understanding of promotional techniques and the basis on which promotional decisions are made.

#### *Examples of how to prove what you understand and can do*

- Notes showing what you found out about the market and the conclusions you have drawn from market research information.
- Copies of written communications made about marketing opportunities and decisions (e.g. emails, memos, presentations and proposals).
- A witness statement from the decision-maker or others involved confirming your ability to make appropriate promotional recommendations (e.g. from your line manager or colleagues).
- A discussion with your assessor about your understanding of the role of promotional techniques and the basis on which decisions are made.