

NVQ Design management Level 4

Guidance on portfolio building

Introduction

This booklet sets out some ideas about what to put in your portfolio for NVQ Design management, level 4.

What is a portfolio

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

Artwork for different design specialisms

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

<i>Graphic design</i>	<p>If you are involved with designing – branding, corporate identity, packaging, design for print, design for advertising (e.g. new media and multimedia, web, the Internet and the Intranet).</p> <p>The artwork will typically consist of digital printouts, freehand sketches, layouts, and mock-ups.</p>
<i>Fashion & textile design</i>	<p>If you are involved with designing – clothing, footwear and accessories, design for print and constructed textiles (e.g. knitting, weave and carpets).</p> <p>The 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.</p>
<i>Product design</i>	<p>If you are involved with designing – domestic products (e.g. ceramics, furniture, lighting consumer and electrical goods), crafts and industrial design.</p> <p>The 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.</p>
<i>Spatial design</i>	<p>If you are involved with designing – interiors, environments, retail and exhibition (it is recognised that exhibition design may also involve graphic and product design).</p> <p>The 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.</p>

Proving your management skills

To prove what you know and understand about being a manager you will need to show different types of evidence. The main way that you will be able to demonstrate your management capability will be through explaining your actions and responsibilities in a discussion with your assessor (sometimes called a professional discussion). When you are assessed, your assessor will not only look at your artwork and other records 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). In addition you may need to show back up evidence, such as:

- copies of the briefs and contracts you have negotiated;
- copies of correspondence with your team, other people in your organisation and external agents;
- any notes you have written describing what needs to be done;
- any records of the research, planning, monitoring and evaluation activities you have carried out;
- video recordings of design presentations, client meetings or team meetings; and
- copies of letters from satisfied clients.

If your assessor is satisfied that you know and understand what is needed for each unit covered by the project then they will sign off. If they are still not sure and ask 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 and other documents that were produced for each project,
- the assessment decision, and
- an indication of where any backup evidence is located.

Which projects to choose

With careful planning it is possible to prove your achievement through 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 consultancy practices, you are likely to undertake two main roles:

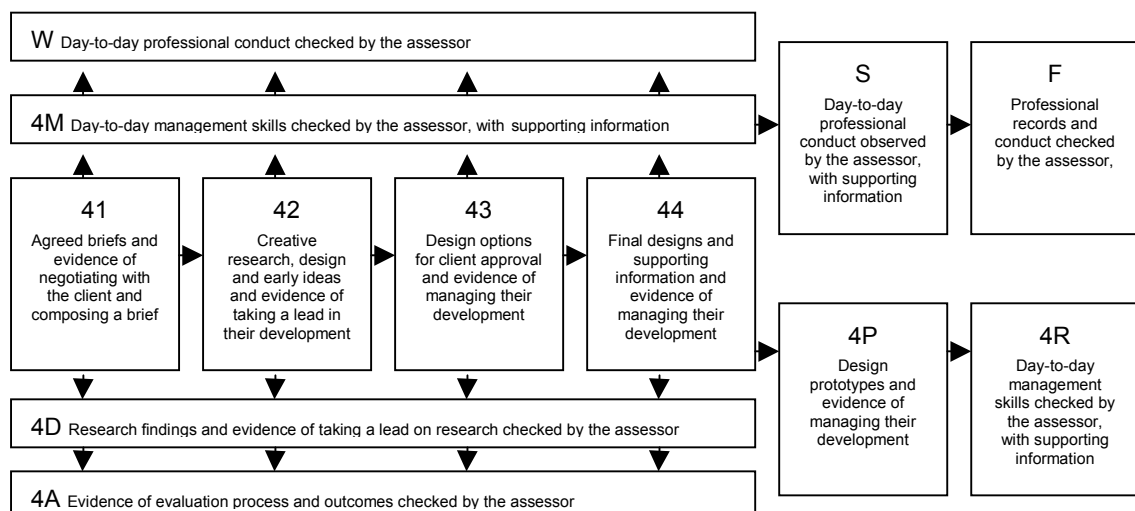
- 1 managing the design service; and
- 2 using the design cycle or process to respond to client briefs.

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 day-to-day work in the design practice.

<i>Projects where you were mainly</i>	<i>Will usually give evidence for the following units</i>
Managing the design service (planning and managing resources, such as costs, time, roles, materials and equipment; and promoting and selling design work)	Core – 41.1, 41.3, 41.4, 42.1, 43.2, 43.3, 44 4M, 4A Optional – 4P, 4R, S, F.2
Using the design cycle or process (developing ideas and solutions to meet a client brief)	Core – 41.2, 42.2, 42.3 and 43.1
Going about your daily work and keeping up-to-date with what other people are doing (in your job in a design consultancy or as a freelance)	Core – 4D and W Optional – F.1

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

The relationship between the units



41 Develop design briefs (Core)

Unit summary

This unit is about negotiating a design brief with a client. As a design manager you will typically be using your professional skills to lead discussions with the client and evaluate information gathered to clarify the design opportunities and any constraints likely to affect the response (e.g. due to skills available within the team, technical limitations or requirements imposed by the client). You will also be involved in contractual arrangements and the re-negotiation of any amendments.

How you can prove this

To achieve this unit you will need to produce a portfolio of:

- research and developmental work for a range of design projects that you have managed, and
- background information about the development and negotiation of client briefs.

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 project artwork you choose may also be submitted for 42, 43 and 44. Some of the evidence of your role in managing the process may also be submitted for units 4M and W.

How to show you can determine and agree client's needs [41.1]

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

- 1 how to discuss with clients what they need and why,
- 2 the design development needs of the client,
- 3 the purpose, scope and limits of the agreed design objectives, and
- 4 how to agree client and designer responsibilities and levels of confidentiality.

Examples of how to prove what you understand and can do

- A discussion with your assessor about your understanding of the process and results of negotiations about the client's needs.
- Copies of any written communications with clients (e.g. emails, faxes, memos or letters)
- Notes on significant outcomes of discussions and meetings with clients (get those involved to sign your notes to confirm they are accurate).

How to show you can analyse opportunities and constraints [41.2]

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

- 1 opportunities that were researched (for example, related to product history, competitive products, product context, the needs of target users, design trends and market direction),
- 2 limitations and constraints that were researched (for example, related to cost, time, environmental considerations, technical and legal and regulatory requirements), and
- 3 how to manage the research process and report the results of research to relevant people (e.g. your team or any external people who will be involved).

Examples of how to prove what you understand and can do

- A discussion with your assessor about your understanding of the research process and the opportunities, limitations and constraints analysed.
- Copies of any written reports, produced by yourself or produced by your team under your management.
- Notes on discussions and meetings about significant information gathered and conclusions drawn from research findings (get those involved to sign your notes to confirm they are accurate).

How to show you can compose briefs with clients [41.3]

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

- 1 the outcomes of research and any significant points likely to affect the design or project work,
- 2 the broad design strategies that will be needed to meet the agreed design objectives,
- 3 any reasons for re-defining client's needs,
- 4 any amendments or variations required by the client, and
- 5 how to negotiate and reach agreements with clients about the detailed requirements of design briefs.

Examples of how to prove what you understand and can do

- A copy of the agreed briefs.
- Copies of any research information presented to and discussed with clients.
- A discussion with your assessor about how the details of a design brief were arrived at.
- Copies of any written communication with clients.
- Notes on significant outcomes of discussions and meetings with clients (get those involved to sign your notes to confirm their accuracy and your ability to compose acceptable briefs).

How to show you can negotiate contracts with clients [41.4]

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

- 1 the terms of the contract and scope for re-negotiation,
- 2 the implications of any potential or actual variations on the proposed project schedule, costs and any other commitments, and
- 3 how to negotiate and reach agreements with clients about the detailed requirements of contracts and any variations for providing a design service.

Examples of how to prove what you understand and can do

- Copies of contracts negotiated and agreed with clients.
- A discussion with your assessor about the terms of contracts and implications of any potential or actual variations.
- Copies of any written communication with clients.
- Notes on significant outcomes of discussions and meetings with clients and any meetings with other people your organisation (get those involved to sign your notes to confirm their accuracy and confirm your ability to negotiate appropriate terms and variations).

42 Originate and develop design concepts and early ideas (Core)

Unit summary

This unit is about originating and developing design concepts and early ideas to meet design objectives agreed with the client. As a design manager you will typically take the lead in developing concepts and ideas which will form the basis of further work undertaken by others involved. The techniques and processes that you use will vary according to your design specialism.

How you can prove this

To achieve this unit you will need to produce a portfolio of design development work for a range of projects you have managed. It should include:

- written and visual records of research,
- concepts and ideas originated by yourself and others in your team, and
- records of project management.

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 project artwork you choose may also be submitted for 41, 43 and 44. Some of the evidence of your role in managing the process may also be submitted for units 4M and W.

How to show you can co-ordinate creative design research and evaluate information [42.1]

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

- 1 visual source material and references,
- 2 cultural, historical and operational factors and forecasting trends,
- 3 market directions, design trends and opportunities,
- 4 product history and competitive products,
- 5 where and how the design or product is to be used,
- 6 alternative materials,
- 7 how to co-ordinate creative design research and evaluate information, and
- 8 how to analyse and communicate research results.

Examples of how to prove what you understand and can do

- Copies of any visual or written results of the creative research process.
- A discussion with your assessor about your understanding of the research process and the creative possibilities identified.
- Copies of advice and instructions to members of your team about their contribution to the creative research process.
- Notes from meetings and discussions on significant sources and visual references identified and evaluated (get those involved to sign your notes to confirm they are accurate).

How to show you can generate design concepts and early ideas [42.2]

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

- 1 how to take a lead in originating design concepts and early ideas,
- 2 the criteria and techniques you used to identify key requirements of the brief and select design concepts and early ideas, and
- 3 the ideas and concepts you selected and the reasons behind your choices.

Examples of how to prove what you understand and can do

- Ideas and concepts you generated yourself or with others.
- A discussion with your assessor about your understanding of methods for generating design concepts and ideas and the decisions behind the agreements reached.

- Notes on discussions about ideas and concepts and reasons for selecting or rejecting them (get those involved to sign your notes to confirm they are accurate).

How to show you can evaluate viability of design concepts and early ideas [42.3]

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

- 1 the evaluation criteria, the client brief and design objectives,
- 2 the creative potential of design ideas and concepts,
- 3 how to take a lead in evaluating design concepts and early ideas, and
- 4 how to communicate agreements about design objectives, concepts and approach to the project.

Examples of how to prove what you understand and can do

- A discussion with your assessor about your understanding of the design criteria, objectives and constraints used to evaluate the viability of designs and concepts.
- Copies of any drawings or notes used to communicate the agreed design objectives, concepts and how to approach the project.
- Notes on meetings or discussions about evaluating ideas and concepts giving reasons for decisions made (get those involved to sign your notes to confirm they are accurate).

43 Oversee the development of design options (core)

Unit summary

This unit is about developing design options. As a design manager you will be responsible for managing the development of design options to meet client needs. This involves selecting suitable design ideas, investigating copyright arrangements and allocating and monitoring work to ensure that design options can be successfully presented and agreed with the client.

How you can prove this

To achieve this unit you will need to produce a portfolio of developmental work for a range of design projects that you have managed.

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 work should show the progression from initial research, exploration and selection of ideas to the development of chosen options, and may also be submitted for units 41, 42 and 44. Some of the evidence of your role in managing the process may also be submitted for units 4M and W.

How to show you can evaluate and select design ideas [43.1]

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

- 1 the ideas generated by yourself and your team,
- 2 the evaluation criteria, the client brief, design objectives and organisational objectives,
- 3 quality parameters relevant to the project,
- 4 performance standards relevant to the specialism,
- 5 qualitative and quantitative analysis techniques,
- 6 technical constraints on design development and design realisation,
- 7 how to evaluate and select designs by interacting effectively with relevant people.

Examples of how to prove what you understand and can do

- A discussion with your assessor about your understanding of the criteria, parameters, standards and constraints relevant to the designs.
- Notes on significant outcomes of discussions and meetings (e.g. with the team, senior managers, the client or any other external agents).

How to show you can research and establish design protection arrangements [43.2]

For this section you need to show how you researched and established design protection for at least two designs or design products. These may be your own or other's design ideas.

You should organise the work in your portfolio to show your understanding of:

- 1 the legal aspects of design protection,
- 2 how current and potential uses of designs may be protected,
- 3 obstacles that may affect compliance with design protection, and
- 4 how to arrange design protection by interacting effectively with relevant people.

Examples of how to prove what you understand and can do

- Records of designs that you organised the protection of.
- A discussion with your assessor about your understanding of design protection.
- Notes on how to obtain design protection and any obstacles affecting the protection of current and potential design uses.
- A witness statement from relevant people confirming the contribution you made to arranging design protection.

How to show you can monitor development of design options [43.3]

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

- 1 the responsibilities and objectives of those involved
- 2 how the design meets the requirements of the brief
- 3 the monitoring criteria and quality control and assurance processes applied
- 4 potential problems and methods for responding to unforeseen difficulties
- 5 how to manage the preparation and presentation of visual interpretation of designs, and
- 6 monitoring the production of work to agreed timescales, budgets and quality standards.

Examples of how to prove what you understand and can do

- A discussion with your assessor about your understanding of the objectives and processes used to manage the development of design options, and to check and chase progress.
- Copies of communication with those developing the design options (e.g. emails, memos, faxes or notes about phone conversations).
- Notes of meetings or discussions about the progress of design development (get those involved to sign your notes to confirm they are accurate).

How to show you can lead presentations and secure agreement from clients [43.4]

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

- 1 the objectives of the presentation,
- 2 alternative presentation formats (e.g. for visuals, 3D displays and the use of technology),
- 3 how to prepare and lead design presentations and secure agreement from clients, and
- 4 the results of the negotiations undertaken.

Examples of how to prove what you understand and can do

- Copies of visuals used for presenting the design options, a copy of any notes about the key issues to be communicated and the role of others involved. (Get the people involved to sign your notes to confirm what they thought about the effectiveness the presentation.)
- Video recordings of client presentations.
- Copies of agreements reached.
- Notes on any significant factors arising from the presentation.
- A discussion with your assessor about your understanding of the objectives and results of the presentation.

44 Oversee the development of final 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. As a design manager you will typically be responsible for managing the preparation of designs for presentation and leading the design presentation to the client.

How you can prove this

To achieve this unit you will need to produce a portfolio of work in response a range of design projects that you have managed.

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 planning, final design presentation artwork and specifications. Some work should show the evolution of ideas from initial research through to final proposal, and may also be submitted for units 41, 42 and 43. Some of the evidence of your role in managing the process may also be submitted for units 4M and W.

How to show you can establish requirements for final design proposals [44.1]

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

- 1 what design realisation information is needed and how it will be researched,
- 2 the quality parameters that need to be set for final visuals,
- 3 what supporting information will be needed and the technical factors that need to be covered, and
- 4 how to take a lead in establishing, confirming and agreeing requirements with others involved (e.g. decision-maker, other designers, support staff and any external agents).

Examples of how to prove what you understand and can do

- A discussion with your assessor about your understanding of relevant quality parameters and technical factors that effect the final realisation, installation, production or replication process.
- Copies of any written communication with others involved that establish and confirm requirements for producing final design proposals.
- Notes from meetings or discussions about the requirements for content and format of final design visuals (get those involved to sign your notes to confirm they are accurate).

How to show you can monitor progress in preparing finished design proposals [44.2]

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

- 1 the responsibilities and objectives of those involved,
- 2 the monitoring criteria and quality control and assurance processes applied to ensure that work meets agreed timescales, budgets and requirements, and
- 3 what potential problems might be and how to respond to unforeseen difficulties.

Examples of how to prove what you understand and can do

- Final artwork for design proposals, produced by yourself or others in your team.
- A discussion with your assessor about your understanding of the objectives and monitoring processes used, and any interventions you needed to make in response to problems.
- Copies of any written communication with the others involved about progress and problems.

How to show you can lead presentations of design and proposed realisation process [44.3]

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

- 1 how you chose appropriate presentation formats for final designs (e.g. in the form of visuals, 3D displays and technology),
- 2 the objectives and format of the presentation,
- 3 how to take the lead in presenting design options to clients and gaining their agreement for the next stage of the project, and
- 4 the results of presentation meetings and reasons for any agreed amendments.

Examples of how to prove what you understand and can do

- Copies of materials used for presenting the final design, a copy of any notes about the key issues to be communicated and any other people's contributions. (Get the people involved to sign your notes to confirm what they thought about the effectiveness the presentation.)
- Video recordings of client presentations.
- A discussion with your assessor about the aims for and results of the design presentation.
- Notes on objectives and results agreed during the presentation meeting (get the people involved to sign them to confirm their accuracy).

4D Monitor and exploit changing trends and developments (core)

Unit summary

This unit is about applying analytical and practical skills to ensure an effective design service is provided to clients. As a design manager you will need to ensure that your staff keep up-to-date with developments in design, materials, techniques and technology. Trends and developments may affect the design solutions produced for particular projects, for example new materials may be suitable for the product or trends may influence the visual appeal of the design. New design materials, techniques and technology may help with design work, for example developments in software, hardware and communications technology.

How you can prove this

To achieve 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 you have managed; and
- evidence of your performance at work over an extended period of time.

How to show you can evaluate design trends and developments [4D.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,
- 3 market directions and competing design services, and
- 4 how to plan and manage research and to communicate the results of analysis and any implications for particular projects and design work in general.

Examples of how to prove what you understand and can do

- Results of exploration into design trends and developments.
- A discussion with your assessor about your understanding of design trends and developments.
- Copies of written communication with your team about research processes and outcomes (e.g. emails, action notes from meetings or 'to do' lists).
- A copy of any written reports, including details of the sources of information. The reports may be the same as or different from those undertaken to prove your abilities for 4D.2 and 4D.3.

How to show you can evaluate materials availability and developments [4D.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 their suitability for use in day-to-day design work and for particular projects
- 3 how you planned and managed research and communicated the results of analysis and any implications for particular projects and design work in general, and
- 4 the reasons for selecting the research and practical investigation techniques that were used.

Examples of how to prove what you understand and can do

- Results of exploration into materials developments for design work and final design realisation.
- A discussion with your assessor about your understanding of materials availability and developments.
- Copies of written communication with your team about research processes and outcomes (e.g. emails, action notes from meetings or 'to do' lists).
- A copy of any written reports, including details of the sources of information. The reports may be the same as or different from those undertaken to prove your abilities for 4D.2 and 4D.3.

How to show you can evaluate developments in design technologies [4D.3]

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

- 1 the capabilities, features, benefits and limitations of design technologies,
- 2 the suitability for use in day-to-day design work and for particular projects,
- 3 how to plan and manage research and to communicate the results of analysis and any implications for particular projects and design work in general, and
- 4 the reasons for selecting the research and practical investigation techniques that were used.

It should include comparison of a range of:

- 3 both existing design technologies, and
- 4 modifications, upgrades and new developments in design technologies.

Examples of how to prove what you understand and can do

- Results of exploration into developments in design technologies for design work and final design realisation.
- A discussion with your assessor about your understanding of developments in design technologies.
- Copies of written communication with your team about research processes and outcomes (e.g. emails, action notes from meetings or 'to do' lists).
- A copy of any written reports, including details of the sources of information. The reports may be the same as or different from those undertaken to prove your abilities for 4D.2 and 4D.3.

4M Manage design services (Core)

Unit summary

This unit is about how you manage the design service. Management is the process through which work and people are organised to meet agreed objectives. It involves thinking about what needs to be done, planning how it will be tackled, organising who will do what. As a design manager you will typically be working under the supervision of a director or partner.

How you can prove this

To achieve this unit you will need to produce evidence of your performance at work over an extended period of time.

How to show you can analyse physical and financial resource requirements [4M.1]

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

- 1 how to work out what physical and financial resources will be needed and any additional resources,
- 3 estimating fixed and variable costs,
- 4 setting project fees, and
- 5 how to spot potential financial problems and keep them to a minimum.

Examples of how to prove what you understand and can do

- Background information about your agreed role and responsibilities in relation to resources.
- Estimates made of physical and financial resource requirements.
- Observation by the assessor of your day-to-day professional conduct within the design team.
- A discussion with your assessor about your understanding of analysis and estimations undertaken and the results obtained.
- Notes from meetings with others involved (e.g. other managers, colleagues or more junior staff) about physical and financial resources (get others involved to sign your notes to confirm they are accurate).

How to show you can establish objectives and roles [4M.2]

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

- 1 setting and updating objectives,
- 2 identifying competencies, roles and skills to meet design objectives, and
- 3 communicating objectives and other information.

Examples of how to prove what you understand and can do

- Background information about your agreed role and responsibilities in relation to objectives and roles.
- Copies of written communication with colleagues and other relevant people about objectives and roles.
- Observation by the assessor of your day-to-day professional conduct within the design team.
- A discussion with your assessor about your understanding of the skills, processes and decisions involved in setting objectives and allocating roles.
- Notes from meetings with others involved (e.g. other managers, colleagues or more junior staff) about objectives and roles (get others involved to sign your notes to confirm they are accurate).

How to show you can develop and manage work schedules [4M.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 the reasoning underlying planning decisions,
- 3 predicting and minimising the affect of contingencies,
- 4 establishing design objectives and performance targets, and
- 5 ways of enhancing co-operation.

Examples of how to prove what you understand and can do

- Project plans, annotated to show any changes made to the schedule and actions taken in response to unforeseen difficulties.
- Copies of any written records of agreements about roles, responsibilities and tasks.
- Notes on any factors likely to affect the schedule and contingency plans identified.
- Observation by the assessor of your day-to-day professional conduct within the design team.
- A discussion with your assessor about your understanding of the planning decisions taken.

How to show you can commission external agents [4M.4]

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

- 1 the skills and competencies needed to meet the agreed objectives,
- 2 how to assess external agents and negotiate contracts with them to carry out agreed work,
- 3 contractual arrangements, organisational policy and legal requirements that need to be met, and
- 4 how to communicate agreed responsibilities, objectives and standards of work.

Examples of how to prove what you understand and can do

- Notes on strengths and weaknesses of potential external agents.
- Copies of any written communication of agreed responsibilities, objectives and standards of work.
- Records of monitoring work (e.g. progress notes, notes from meetings, copies of emails).
- Observation by the assessor of your day-to-day professional conduct within the design team
- A discussion with your assessor about your understanding of the commissioning process, associated requirements and objectives.

How to show you can provide feedback to groups and individuals on their performance [4M.5]

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

- 1 how to appraise performance,
- 2 how to handle potentially sensitive and confidential information,
- 3 how to provide feedback and offering suggestions to improve performance, and
- 4 how to discuss, agree and record information about performance.

Examples of how to prove what you understand and can do

- Notes from individual discussions or team meetings with staff about their performance (e.g. development reviews, personal appraisals, project debriefings).
- Copies of any written feedback given to staff (e.g. emails, formal records of development reviews or personal appraisals).
- Observation by the assessor of your day-to-day professional conduct within the design team.
- A discussion with your assessor about your understanding of ways of improving staff performance.

4A Assess design services (Core)

Unit summary

This unit is about the process of using evaluation and monitoring skills to assess the effectiveness of the design service provided to clients. This involves judging the outcomes of the work and the performance of the team, using suitable criteria to make assessments and making recommendations for future practice. Assessment may relate 'for example' to fitness for purpose, quality, costs, time management and potential for improvement.

How you can prove this

To achieve this unit you will need to produce a portfolio of evidence of:

- evaluating at least two major completed projects you managed,
- evaluating at least two designs produced by other organisations,
- evaluating the ongoing service provided to regular clients, and
- your performance at work over an extended period of time.

How to show you can establish monitoring and evaluation methods [4A.1]

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

- 1 techniques, criteria and sources of evidence, and
- 2 any conditions, changes or constraints likely to affect the task.

Examples of how to prove what you understand and can do

- Notes from discussions or meetings about the evaluation methods to be used and the roles and actions of others involved in carrying out the evaluation. (Get those involved to sign your notes to confirm they are accurate.)
- Copies of written communication to those involved in your team or outside the organisation (e.g. clients, external agents, research organisations or competitors).
- Copies of written or oral evaluation reports, with notes on working methods and criteria selected (e.g. formal reports, presentation notes and overheads). The same report can be submitted for both 4A.1 and 4A.2.
- A discussion with your assessor about your understanding of evaluation processes and any conditions or constraints.

How to show you can undertake evaluation of design responses and the design service [4A.2]

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

- 1 differences between design solutions and agreed criteria,
- 2 design trends or opportunities that may affect future commissions,
- 3 strengths and weaknesses in the design service that could have an impact on future commission, and
- 4 any changes to working practices that have the potential to improve business effectiveness and quality standards.

Examples of how to prove what you understand and can do

- Copies of written or oral evaluation reports, with notes on working methods and criteria selected (e.g. formal reports, presentation notes and overheads). The same report can be submitted for both 4A.1 and 4A.2.
- Notes from discussions or meetings about the results of the evaluations and conclusions drawn for future design projects and services. (Get those involved to sign your notes to confirm they are accurate.)
- A discussion with your assessor about your understanding of outcomes of the evaluation process.

4P Oversee the realisation of design prototypes (Optional)

Unit summary

This unit is about overseeing the realisation or production of models, prototypes, samples or test pieces using small-scale production techniques. The prototype will enable those involved in the project to evaluate the final form and detail of the proposed final product. As a design manager you will typically be responsible for ensuring that any 2D or 3D design prototype is evaluated in terms of its functional viability and identifying any potential difficulties or opportunities for final realisation.

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 that you have managed. 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).

How to show you can establish aims and plan the realisation process [4P.1]

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

- 1 aims, deadlines and budgets for realising design prototypes,
- 2 roles and resources, and
- 3 how to plan and communicate with those involved.

Examples of how to prove what you understand and can do

- Notes about the aims and objectives for producing a prototype (e.g. meeting notes, instructions, emails).
- Copies of estimates of costs and other resources needed.
- Plans giving details of the roles, 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 planning and monitoring of small-scale realisation projects to meet aims and deadlines, and ways to overcome any unforeseen problems.

How to show you can monitor realisation and evaluate prototypes [4P.2]

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

- 1 the quality parameters for small-scale realisation processes,
- 2 how to monitor the realisation and evaluation of prototypes,
- 3 your responses to potential or actual problems,
- 4 how to report on their suitability to relevant people, and
- 5 the implications of the results of evaluation process for particular projects and design work in general.

Examples of how to prove what you understand and can do

- Examples of complete or incomplete prototypes produced by yourself, your team or external agents.
- Notes from discussions or meetings on evaluation methodology, results obtained and conclusions drawn (get those involved to sign your notes to confirm they are accurate).
- A copy of any evaluation reports produced by yourself or your team about the prototypes.
- A discussion with your assessor about your understanding of small-scale realisation processes, evaluation techniques and effectiveness of prototypes.

4R Oversee the realisation of final design product(s) (Optional)

Unit summary

This unit is about overseeing the production or installation of the final design product (such as an interior or exhibition design installation or the commercial production of a product design). As a design manager you will typically be responsible for ensuring that the final product(s) are produced or installed to an acceptable standard to meet the clients needs.

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 projects that you have overseen. 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. The projects you choose may involve realisation work carried out by your design organisation or by external agents.

How to show you can take a lead in planning the final realisation process [4R.1]

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

- 1 establishing constraints, skills and resource requirements,
- 2 where relevant taking on suitable external agents,
- 3 checking plans and schedules,
- 4 allocating resources, and
- 5 communicating plans and recording agreements.

Examples of how to prove what you understand and can do

- Copies of detailed specifications for the final realisation process.
- Plans giving details of the stages of work, deadlines, annotated to show any changes or modifications.
- 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.)
- Copies of any written communication with colleagues and other relevant people about plans, estimates and tasks.
- Observation by the assessor of your day-to-day professional conduct overseeing final realisation processes.
- A discussion with your assessor about your understanding of constraints and skills and resources required for final design realisation processes.

How to show you can manage the realisation of final design product(s) [4R.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 how to monitor progress and quality,
- 3 responses to potential or actual problems, and
- 4 handover procedures.

Examples of how to prove what you understand and can do

- Notes of discussions or meetings about the progress of final realisation work and solving any problems involved. (Get the people involved to sign your notes to confirm they are accurate.)
- Notes on problems foreseen and unforeseen and responses made (e.g. events related to the involvement of external agents, changes to plans or working methods and referral to relevant people).
- Observation by the assessor of your day-to-day professional conduct overseeing final realisation processes.
- Notes you made for the client about the hand-over.
- A discussion with your assessor about your understanding of realisation processes and monitoring techniques.
- A witness statement from the decision-maker or others involved confirming your ability to work with others to

realise final designs.

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.

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.

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.

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.

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

For this section you need to demonstrate your performance in:

- 6 negotiating and liaising with clients,
- 7 encouraging clients to commit themselves to an agreement,
- 8 modifying proposals during negotiation, and
- 9 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.

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).

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.