

### Overview

This unit is about managing projects and the team that delivers design solutions to meet the project brief. It is about ascertaining stakeholders' requirements, exploring the constraints and risks and agreeing deliverables to meet the various demands and needs. You must have a detailed knowledge of the stakeholders' areas of operation and future aspirations. You need to clarify the project stakeholders' understanding of project processes and peoples' roles and responsibilities.

It is about analysing the project brief and developing an outline programme. You will need to advise the project stakeholders about new technological requirements and innovations to enable them to make informed decisions. You will also need to present an outline programme to the stakeholders and agree it with them.

**Performance criteria**

**You must be able to:**

Prepare proposal for a project brief

- P1 identify and agree the stakeholders' requirements, opinions and aspirations and prepare a project proposal
- P2 select data which is relevant and valid, analyse it and qualify its status
- P3 estimate and confirm the cost and timescale of the project
- P4 review the cost implications of adopting alternative design, construction, services, financing and use strategies and agree them with stakeholders
- P5 prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders
- P6 explain and discuss any significant constraints, opportunities and areas of uncertainty relating to the project
- P7 modify the draft to reflect the discussion and relevant points which have been raised
- P8 negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project

Develop a project outline programme which meets the requirements of the brief

**You must be able to:**

- P9 review the requirements of the brief and check and clarify initial assumptions about the project outline programme with stakeholders
- P10 develop a realistic outline programme for the project stages which takes account of identified constraints
- P11 discuss the outline programme with stakeholders and agree any necessary modifications to the brief, outline programme and constraints
- P12 prepare, present and agree an outline programme which meets the requirements of the brief and the expectations of stakeholders

Identify, assess and agree project requirements and stakeholder preferences

**You must be able to:**

- P13 clarify the project stakeholders' understanding of project processes and procedures and the roles of those who need to be involved
- P14 identify and agree with project stakeholders what their goals and priorities are both now and for the future
- P15 clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project
- P16 advise and guide project stakeholders about new regulatory or technological requirements and innovations to enable them to make informed decisions
- P17 summarise and present the project requirements and stakeholders' preferences
- P18 evaluate project requirements and stakeholders' preferences which do not appear to be realistic and recommend valid options and record agreement

**Knowledge and understanding**

You need to know and understand:

Prepare proposal for a project brief

- K1 what to identify as stakeholders' requirements opinions and aspirations (understanding)
- K2 how and why to agree the stakeholders' requirements opinions and aspirations (evaluation)
- K3 how to prepare a project proposal (application)
- K4 how and why to select data which is relevant and valid (evaluation)
- K5 how and why to analyse data and qualify its status (analysis)
- K6 how and why to estimate the cost and timescale of the project (analysis)
- K7 how to confirm the cost and timescale of the project (application)
- K8 how and why to review the cost implications of adopting alternative design, construction, services, financing and use strategies (analysis)
- K9 how and why to agree the cost implications of adopting alternative design, construction, services, financing and use strategies with stakeholders (evaluation)
- K10 how and why to prepare a draft brief clearly, accurately, unambiguously and within the time agreed (synthesis)
- K11 how to present the brief to stakeholders (application)
- K12 how to explain any significant constraints, opportunities and areas of uncertainty relating to the project (application)
- K13 how and why to discuss any significant constraints, opportunities and areas of uncertainty relating to the project (synthesis)
- K14 how to modify the draft to reflect the discussion and relevant points which have been raised (application)
- K15 how and why to negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project (synthesis)

Develop a project outline programme which meets the requirements of the brief

You need to know and understand:

- K16 how and why to review the requirements of the brief (analysis)
- K17 how to check and clarify the initial assumptions about the project outline programme with stakeholders (application)
- K18 how and why to develop a realistic outline programme for the project stages which takes account of identified constraints (synthesis)
- K19 how to discuss the outline programme with stakeholders (application)
- K20 how and why to agree any necessary modifications to the brief, outline programme and constraints (evaluation)

Knowledge and understanding

- K21 how and why to prepare an outline programme which meets the requirements of the brief and the expectations of stakeholders (synthesis)
- K22 how to present an outline programme which meets the requirements of the brief and the expectations of stakeholders (application)
- K23 how and why to agree an outline programme which meets the requirements of the brief and the expectations of stakeholders (evaluation)

Identify, assess and agree project requirements and stakeholder preferences

You need to know and understand:

- K24 how to clarify the project stakeholders' understanding of project processes and procedures and the roles of those who need to be involved (application)
- K25 what to identify as the project stakeholders' goals and priorities both now and in the future (understanding)
- K26 how and why to agree with the project stakeholders what their goals and priorities are both now and in the future (evaluation)
- K27 how to clarify the project stakeholders' circumstances and requirements, the options available and the constraints and risks which might apply to the project (application)
- K28 how and why to advise project stakeholders about new regulatory or technological requirements and innovations to enable them to make informed decisions (synthesis)
- K29 how and why to guide project stakeholders about new regulatory or technological requirements and innovations to enable them to make informed decisions (synthesis)
- K30 how to summarise the project requirements and stakeholders' preferences (application)
- K31 how to present the project requirements and stakeholders' preferences (application)
- K32 how and why to evaluate project requirements and stakeholders' preferences which do not appear to be realistic (evaluation)
- K33 how and why to recommend valid options to meet project requirements and stakeholders' preferences (synthesis)
- K34 how to record agreement on valid options to meet project requirements and stakeholders' preferences (application)

Scope/range

Prepare proposal for a project brief

- 1 Stakeholders:
  - 1.1 consultants
  - 1.2 the client
  - 1.3 the client's financial advisers
  - 1.4 statutory authorities
  - 1.5 CDM co-ordinator (or responsible body under CDM regulations)
  - 1.6 project managers
  - 1.7 potential contractors
  - 1.8 potential subcontractors and suppliers
  - 1.9 potential investors
  - 1.10 funding agencies
  - 1.11 independent client adviser
  - 1.12 user groups
  - 1.13 community groups
  - 1.14 facilities/asset managers
- 2 Project proposal - will consider:
  - 2.1 the client's requirements
  - 2.2 project stage information requirements
  - 2.3 user requirements
  - 2.4 design quality requirements
  - 2.5 ergonomic requirements
  - 2.6 community requirements
  - 2.7 procurement requirements
  - 2.8 physical requirements
  - 2.9 resource requirements
  - 2.10 construction requirements
  - 2.11 legal requirements
  - 2.12 cost requirements
  - 2.13 business opportunities and objectives
  - 2.14 risk factors
  - 2.15 health, safety and welfare requirements
  - 2.16 current and future needs

Scope/range

- 2.17 energy, water and natural resource management
- 2.18 compliance with local, regional national development strategies
- 2.19 Building Information Modelling
- 2.20 insurance risks/opportunities associated with new technologies
- 2.21 adaptation and mitigation

3 Review:

- 3.1 cost benefit analysis
- 3.2 whole life costing
- 3.3 value management
- 3.4 feasibility studies
- 3.5 elemental cost planning

4 Present:

- 4.1 orally
- 4.2 in writing
- 4.3 graphically
- 4.4 electronically

Develop a project outline programme which meets the requirements of the brief

5 Programme:

- 5.1 timetable phasing
- 5.2 integration of data
- 5.3 interaction between design consultants
- 5.4 critical path
- 5.5 key project stages/gate management plan
- 5.6 interface between design, procurement, construction, operation and end use
- 5.7 interaction with design approval stages
- 5.8 interaction with construction programme
- 5.9 concurrent design and construction
- 5.10

6 Stakeholders:

- 6.1 consultants
- 6.2 the client
- 6.3 the client's financial advisers

Scope/range

- 6.4 statutory authorities
- 6.5 CDM co-ordinator (or responsible body under CDM regulations)
- 6.6 project managers
- 6.7 potential contractors
- 6.8 potential subcontractors and suppliers
- 6.9 potential investors
- 6.10 funding agencies
- 6.11 independent client adviser
- 6.12 user groups
- 6.13 community groups
- 6.14 facilities/asset managers
- 7 Project stages:
  - 7.1 Stage 0 (Strategy)
  - 7.2 Stage 1 (Brief)
  - 7.3 Stage 2 (Concept)
  - 7.4 Stage 3 (Definition)
  - 7.5 Stage 4 (Design)
  - 7.6 Stage 5 (Build and Commission)
  - 7.7 Stage 6 (Handover and Closeout)
- 8 Constraints:
  - 8.1 work content
  - 8.2 time duration/sequencing
  - 8.3 resources available
  - 8.4 contingencies
  - 8.5 budget
  - 8.6 site
  - 8.7 risk and valuation
  - 8.8 regulations
- 9 Expectations:
  - 9.1 design quality
  - 9.2 consultation
  - 9.3 timetable
  - 9.4 phasing of design development

Scope/range

9.5 best value

Identify, assess and agree project requirements and stakeholder preferences

10 Clarify the project stakeholders' circumstances and requirements by:

10.1 reference to standard documentation

10.2 checklists

10.3 client consultation

10.4 questionnaires

10.5 comparative field research

10.6 market research

10.7 identifying options and alternatives

10.8 use of benchmarking tool(s)

10.9 digital exchange

11 Processes and procedures:

11.1 Project Information Plan

11.2 Model Delivery Plan

11.3 information management accountabilities

11.4 implementation plans

11.5 capability assessments

11.6 delivery plans

11.7 execution plans

11.8 levels of graphical and non-graphical detail/development

12 Agree:

12.1 direct with a client

12.2 by negotiation and agreement with partnering team

12.3 facilitation

13 Project stakeholders:

13.1 consultants

13.2 the client

13.3 the client's financial advisers

13.4 statutory authorities

13.5 CDM co-ordinator (or responsible body under CDM regulations)

13.6 project managers



Scope/range

- 13.7 potential contractors
- 13.8 potential subcontractors and suppliers
- 13.9 potential investors
- 13.10 funding agencies
- 13.11 independent client adviser
- 13.12 user groups
- 13.13 community groups
- 13.14 facilities/asset managers
- 14 Goals and priorities:
  - 14.1 quantity
  - 14.2 design quality
  - 14.3 time
  - 14.4 use/adaptability/maintenance
  - 14.5 whole life costs
  - 14.6 health, safety and welfare
  - 14.7 sustainability
  - 14.8 economic benefits
  - 14.9 community benefits
  - 14.10 security
  - 14.11 market demands
  - 14.12 changing circumstances
- 15 Constraints and risks:
  - 15.1 cost
  - 15.2 time
  - 15.3 quality
  - 15.4 health and safety
  - 15.5 the environment
  - 15.6 the client's requirements
  - 15.7 system compatibility
  - 15.8 system interoperability
- 16 Present:
  - 16.1 orally
  - 16.2 in writing

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Scope/range

16.3 graphically

16.4 electronically

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Prepare and agree a project brief and outline programme in construction management

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