

COSBEDMO07 - SQA Unit Code HG47 04

Confirm project requirements and needs in built environment design management



Overview

This unit is concerned with the confirmation of the project requirement, stakeholder preferences and defining and confirming the needs and expectations of users and the wider community. It is about clarifying and agreeing project goals, priorities, functional and performance requirements and aligning these to stakeholder expectations and preferences. You must be able to clarify the project stakeholders' understanding of the project process and their respective (and potentially conflicting) goals and priorities.

You will need to show how you identify the functional and performance requirements for the project and agree realistic and valid options. It is about identifying user functional and performance requirements for a project and the options and constraints related to these. You must be able to identify user needs and consequential requirements, which may have an effect upon other stakeholders. You should be able to demonstrate the identification, assessment, presentation and agreement of suitable options.

It is about identifying community needs and expectations for a project. You must be able to identify community interests and groups, their expectations and potential reactions. You should also show how you identify and present suitable options in a manner and format which is clear and readily understandable.

**Performance
criteria**

You must be able to:

Clarify and agree project requirements and stakeholder preferences

- P1 clarify **stakeholders'** understanding of project **processes** and the roles of those who need to be involved, including current and future **goals and priorities**
- P2 identify and **agree protocols** for exchange of information to enable project collaboration, integration and delivery
- P3 identify the function and performance requirements for the project
- P4 **clarify the project stakeholders'** circumstances and requirements, the options available and the **constraints and risks** which might apply to the project
- P5 challenge project requirements and **stakeholders'** preferences which do not appear to be realistic, decide valid options and **agree** them in writing
- P6 summarise and **present** the project requirements and **stakeholders'** preferences

Define user needs

You must be able to:

- P7 **identify** the types of user, their **needs** and the functions and performance requirements for the project
- P8 **identify** the options available and the constraints which might apply to the project
- P9 decide which options are valid, **present** them and agree them with **stakeholders** in writing

Define community needs

You must be able to:

- P10 identify **what the members of the community expect, and might need** from the project
- P11 **investigate** and identify how members of the community are likely to react to the project, and what their preferences are
- P12 decide which options are valid and realistic, **present** them to **stakeholders** in the project, and agree them in writing

Knowledge and understanding

You need to know and understand:

Clarify and agree project requirements and stakeholder preferences

- K1 how to clarify **stakeholders'** understanding of project **processes** and the roles of those who need to be involved, including current and future **goals and priorities** (application)
- K2 what to identify as **protocols** for exchange of information to enable project collaboration, integration and delivery (understanding)
- K3 how and why to **agree protocols** for exchange of information to enable project collaboration, integration and delivery (evaluation)
- K4 what to identify as the function and performance requirements for the project (understanding)
- K5 how to **clarify the project stakeholders' circumstances and requirements**, the options available and the **constraints and risks** which might apply to the project (application)
- K6 how and why to challenge project requirements and **stakeholders'** preferences which do not appear to be realistic, decide valid options and **agree** them in writing (analysis)
- K7 how and why to decide valid options and **agree** them in writing (evaluation)
- K8 how to summarise and **present** the project requirements and **stakeholders'** preferences (application)

Define user needs

You need to know and understand:

- K9 what to **identify** as the types of user (understanding)
- K10 what to **identify** to be the options available and the constraints which might apply to the project (understanding)
- K11 how and why to identify users' **needs** and also the functions and performance requirements for the project (understanding)
- K12 how and why to decide which options are valid (evaluation)
- K13 how to **present** valid options to **stakeholders** (application)
- K14 how and why to agree options in writing with **stakeholders** (evaluation)

Define community needs

You need to know and understand:

- K15 what to identify as **what the members of the community expect, and might need** from the project
- K16 how and why to **investigate** how members of the community are likely to react to the project, and what their preferences are (analysis)
- K17 what to identify as to how members of the community are likely to react to the project, and what their preferences are (understanding)
- K18 how and why to decide which options are valid and realistic (evaluation)

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**Knowledge and
understanding**

- K19 how to **present** valid options to **stakeholders** in the project (application)
- K20 how and why to agree valid options in writing (evaluation)

Scope/range

Clarify and agree project requirements and stakeholder preferences

- 1 Stakeholders:
 - 1.1 the client
 - 1.2 financial advisers/investors and funders
 - 1.3 design consultants
 - 1.4 potential contractors
 - 1.5 potential subcontractors and suppliers
 - 1.6 independent client advisers
 - 1.7 facility/asset managers
 - 1.8 user groups
 - 1.9 community
- 2 Processes:
 - 2.1 project stages
 - 2.2 contractual
 - 2.3 statutory
- 3 Goals and priorities:
 - 3.1 quantity
 - 3.2 quality (including design)
 - 3.3 cost
 - 3.4 time
 - 3.5 development
 - 3.6 improvement
 - 3.7 use/adaptability
 - 3.8 whole life costs
 - 3.9 environmental benefits
 - 3.10 sustainability
 - 3.11 energy sources
 - 3.12 carbon
 - 3.13 security
 - 3.14 health, safety and welfare
 - 3.15 economic and social benefits
- 4 Agree:
 - 4.1 direct with a client

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Scope/range

- 4.2 by negotiation and agreement with partnering team
- 4.3 facilitation
- 5 Protocols:
 - 5.1 information requirements
 - 5.2 implementation plans
 - 5.3 capability assessments
 - 5.4 delivery plans
 - 5.5 execution plans
- 6 Clarify the project stakeholders' circumstances and requirements by:
 - 6.1 reference to standard documentation
 - 6.2 checklist
 - 6.3 comparative field research
 - 6.4 consultation/survey
 - 6.5 identifying options and alternatives
 - 6.6 use of benchmarking tool(s)
 - 6.7 digital exchange
- 7 Constraints and risks:
 - 7.1 cost
 - 7.2 quality
 - 7.3 time
 - 7.4 health and safety
 - 7.5 the environment
 - 7.6 client
 - 7.7 physical
 - 7.8 statutory and regulatory
 - 7.9 technical
- 8 Present:
 - 8.1 orally
 - 8.2 in writing
 - 8.3 graphically
 - 8.4 electronically

Scope/range

Define user needs

- 9 Identify by:
 - 9.1 consultation with interested parties (clients, users, statutory bodies)
 - 9.2 inspecting standard documentation and advisory material
 - 9.3 results of comparative field research
 - 9.4 use of benchmarking tool
- 10 Needs:
 - 10.1 purpose of use
 - 10.2 location
 - 10.3 occupancy
 - 10.4 site access
 - 10.5 access to services
 - 10.6 access to transport
 - 10.7 design quality (functionality, build quality, maintenance, impact)
 - 10.8 space standards and requirements for spatial organisation and relationship of functions
 - 10.9 health and safety
 - 10.10 environmental benefits
 - 10.11 accessibility
 - 10.12 sustainability
 - 10.13 disabled access and facilities
- 11 Identify by:
 - 11.1 consultation with interested parties (clients, users, statutory bodies)
 - 11.2 inspecting standard documentation and advisory material
 - 11.3 results of comparative field research
 - 11.4 use of benchmarking tool
- 12 Present:
 - 12.1 orally
 - 12.2 in writing
 - 12.3 graphically
 - 12.4 electronically
- 13 Stakeholders:
 - 13.1 clients

Scope/range

- 13.2 representatives of users
- 13.3 statutory bodies
- 13.4 consultants
- 13.5 facility/asset managers
- 13.6 partners

Define community needs

- 14 What the members of the community expect, and might need:
 - 14.1 location
 - 14.2 scale
 - 14.3 occupancy
 - 14.4 significance/status
 - 14.5 use/adaptability
 - 14.6 site access
 - 14.7 access to services
 - 14.8 access to transport infrastructure
 - 14.9 legal and regulatory constraints on development and development process
 - 14.10 project programme and budget
 - 14.11 environmental impact
 - 14.12 design quality (functionality, build quality, impact, maintenance)
 - 14.13 sustainable development
 - 14.14 performance of transportation systems
 - 14.15 health and safety
 - 14.16 public/private space
 - 14.17 security
 - 14.18 employment and skills development
- 15 Investigate - by:
 - 15.1 documentation
 - 15.2 consultation
 - 15.3 comparative field research
 - 15.4 use of benchmarking tools
- 16 Present:
 - 16.1 orally

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Scope/range

- 16.2 in writing
- 16.3 graphically
- 16.4 electronically
- 17 Stakeholders:
 - 17.1 clients
 - 17.2 representatives of community
 - 17.3 statutory bodies
 - 17.4 consultants
 - 17.5 facility/asset managers
 - 17.6 partners

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