

## SQA Advanced Unit Specification

### General information for centres

**Unit title:** Project Management: Managing the Implementation of a Project

**Unit code:** HROT 48

**Unit purpose:** This Unit is designed to provide the candidate with the knowledge and skills required to run a project, which has been given approval to proceed to implementation. The resultant skills will enable the candidate to manage and control project resources including project relationships and the budget within the context of efficient management of risk and change.

This Unit is intended for existing and aspiring project managers, as well as those who want to develop knowledge and skills in managing the implementation of a project. It is unlikely that they will already hold any formal project management qualifications. The unit aims to enable the management of the implementation of an approved and planned project; it also includes evaluation and formal closure of a project.

On completion of this Unit, the candidate should be able to:

- 1 Manage project relationships.
- 2 Control a project budget.
- 3 Monitor and control a project.
- 4 Manage risks and issues.
- 5 Evaluate and close a project.

**Credit points and level:** 2 SQA Credits at SCQF level 8: (16 SCQF credit points at SCQF level 8\*)

*\*SCQF credit points are used to allocate credit to qualifications in the Scottish Credit and Qualifications Framework (SCQF). Each qualification in the Framework is allocated a number of SCQF credit points at an SCQF level. There are 12 SCQF levels, ranging from National 1 to Doctorates.*

**Recommended prior knowledge and skills:** Access to this Unit will be at the discretion of the Centre. However it would be beneficial if the candidate had some general communication, numeracy and practical computing skills as might be demonstrated by the achievement of Units in Communication at SCQF level 6, Numeracy at SCQF level 5 and Using Information Technology at SCQF level 5. In the absence of such evidence, equivalent experience and regular computing experience within a working environment would be desirable.

This Unit has been designed as one of two Units that comprise a Professional Development Award in Project Management. If this Unit is to be studied as part of the PDA then the natural sequence would be for this Unit to follow on from the Unit on *Project Management: Project Justification and Planning* (HV58 48). However it could be delivered as a stand-alone Unit at the discretion of the Centre if it is determined that the knowledge and skills developed within this Unit are all that are required to enhance the capability of the candidate.

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**Core Skills:** There are opportunities to develop the Core Skills of *Communication*, *Working with Others* and *Problem Solving* at SCQF level 6 in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

**Context for delivery:** If this Unit is delivered as part of a Group Award, it is recommended that it should be taught and assessed within the subject area of the Group Award to which it contributes.

**Assessment:** The Knowledge and Skills elements of this Unit are predominantly practical and workplace based. Therefore, it is recommended that the Outcomes be assessed by means of the development of project management documentation, covering all of the requirements of the five Outcomes, for a real project for which the candidate has responsibility. Alternatively, a simulated or case-study based project that derives from the workplace can be provided by the Centre. Whether this is delivered as a single assessment or as a series of several assessments matching the progression of the Outcomes, is at the discretion of the centre.

Where there are opportunities to cross-assess this Unit with the other project-oriented Unit in the PDA, then it is recommended that this be considered.

All assessments are assignment or portfolio based. Assessors should assure themselves of the authenticity of each candidate's submission.

## **SQA Advanced Unit specification: statement of standards**

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The sections of the Unit stating the Outcomes, Knowledge and/or Skills, and Evidence Requirements are mandatory.

Where evidence for Outcomes is assessed on a sample basis, the whole of the content listed in the Knowledge and/or Skills section must be taught and available for assessment. Candidates should not know in advance the items on which they will be assessed and different items should be sampled on each assessment occasion.

### **Outcome 1**

Manage project relationships

#### **Knowledge and/or Skills**

- ◆ Stakeholders
- ◆ Partnership working
- ◆ Effective communications
- ◆ Resolving conflict and handling negotiations

#### **Evidence Requirements**

The candidate must cover all knowledge and/or skills above by providing evidence which demonstrates their knowledge of how to work and communicate effectively with the project team and other stakeholders.

In providing evidence to demonstrate skills in the creation of tools to help manage project stakeholders, including partners if there are any, and maintain effective project communications the candidate should:

- ◆ make use of a suitable technique to identify key stakeholders and their project involvement
- ◆ create a suitable framework for project communications

To demonstrate basic knowledge and understanding of how to deal with partnerships (inter-departmental or cross organisational), the candidate should:

- ◆ using examples from within an organisation, compare and contrast two alternative approaches to project partnership including the relative effectiveness of the partnerships

In demonstrating their knowledge and understanding of how to handle minor conflict and simple negotiations the candidate should:

- ◆ apply conflict resolution techniques in accordance with good practice to a particular scenario involving conflict with an individual or a group within a project environment
- ◆ apply negotiation techniques in accordance with good practice to a particular scenario involving the need to negotiate with an individual or a group within a project environment

#### **Assessment Guidelines**

The assessment for this Outcome could be based on a real workplace project for which the candidate has responsibility. If this is not possible or the project is not suitable for assessment purposes then a simulated or case-study based project that derives from the workplace can be provided by the Centre.

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Where a candidate wishes to use a real workplace project, selection should be made in consultation with their line manager and tutor. Suitability of the project for assessment purposes will be determined by the Centre.

For this Outcome it may be appropriate to assess individual elements separately using different assessment methods and materials.

If appropriate the candidate should continue to use the same project for all Unit Outcomes.

It is recommended that the candidate adopt the following tools to help manage project stakeholders and maintain effective project communications:

- ◆ a stakeholder map to identify key stakeholders and their project involvement
- ◆ a framework for project communications presented as a mapping of stakeholders against channel of communication, indicating regularity, who to and who from

Appropriate methods for a candidate to demonstrate knowledge and understanding of how to handle minor conflict and simple negotiations include role play, verbal explanation or written description.

## **Outcome 2**

Control a project budget

### **Knowledge and/or Skills**

- ◆ Project funding
- ◆ Cost headings for project budget
- ◆ Estimating and forecasting techniques
- ◆ Monitoring, updating and reporting

### **Evidence Requirements**

The candidate must provide evidence to cover all knowledge and/or skills above by producing examples of forecasted and actual project budgets including financial monitoring reports for a fixed period of a project.

To demonstrate the required knowledge and skills the candidate should:

- ◆ identify sources, amounts and timings of funding to cover project costs
- ◆ identify and justify appropriate cost headings for the project budget
- ◆ apply estimating and forecasting techniques to create reliable projections for project spend
- ◆ apply these techniques to re-profile spend during the lifetime of the project
- ◆ monitor, update and report on project income, expenditure and budget variations for two reporting periods

### **Assessment Guidelines**

Ideally the assessment for this Outcome should be based on a real workplace project for which the candidate has responsibility. If this is not possible or the project is not suitable for assessment purposes then a simulated or case-study based project that derives from the workplace can be provided by the Centre.

Where a candidate wishes to use a real workplace project, selection should be made in consultation with their line manager and tutor. Suitability of the project for assessment purposes will be determined by the Centre.

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If appropriate the candidate should use the same project for all Unit Outcomes.

The Centre will determine in discussion with the candidate an appropriate period of time over which the project finances should be monitored and reported. It is recommended that this cover at least two reporting periods eg months.

For this Outcome it would be appropriate to consider cross-assessment with Outcome 3 in order to integrate the application of techniques such as estimating, scheduling, tracking and reporting to resource management and project stages.

For a candidate who will study both Units in the PDA, the Centre might consider cross-assessment of this Unit with the Unit on *Project Management: Project Justification and Planning*. This is particularly relevant in the avoidance of over assessment of the topics covered by Outcome 2 in this Unit and Outcome 2 from the Unit on Project Management: Project Justification and Planning.

### Outcome 3

Monitor and control a project

#### Knowledge and/or Skills

- ◆ Project deliverables
- ◆ Plans for project stages and achievement of milestones
- ◆ Delivery tasks and task interdependencies
- ◆ Scheduling
- ◆ Progress tracking
- ◆ Quality reviews
- ◆ Lessons learned

#### Evidence Requirements

The candidate must provide evidence to cover all knowledge and/or skills above by producing project documentation which demonstrates their ability to monitor and control the tasks and resources of a project, including the quality of the project deliverables, for a fixed period of a project.

To demonstrate the required knowledge and skills the candidate should:

- ◆ define project deliverables and the standards and quality criteria applied to their production
- ◆ create a plan for each project stage, scheduling tasks and resources, and identifying milestones
- ◆ update plans, with reasons for changes, to reflect actual activity and progress for two reporting periods
- ◆ explain the purpose of one of the scheduled quality reviews including who should attend and why
- ◆ describe how any lessons learned might be recorded during the project and how they could be shared

#### Assessment Guidelines

Ideally the assessment for this Outcome should be based on a real workplace project for which the candidate has responsibility. If this is not possible or the project is not suitable for assessment purposes then a simulated or case-study based project that derives from the workplace can be provided by the Centre.

Where a candidate wishes to use a real workplace project, selection should be made in consultation with their line manager and tutor. Suitability of the project for assessment purposes will be determined by the Centre.

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If appropriate the candidate should use the same project for all Unit Outcomes.

The Centre will determine in discussion with the candidate an appropriate period of time over which the project should be monitored and controlled. It is recommended that this cover at least two reporting periods eg months.

For this Outcome it would be appropriate to consider cross-assessment with Outcome 2 in order to integrate the application of techniques such as estimating, scheduling, tracking and reporting to resource management and project stages.

### Outcome 4

Manage risks and issues

#### Knowledge and/or Skills

- ◆ Project risk log
- ◆ Risk reporting
- ◆ Danger signals or project failure signs
- ◆ Changes and issues

#### Evidence Requirements

The candidate must provide evidence to cover all knowledge and/or skills above by producing project documentation to manage risks, issues and changes including supporting logs and monitoring reports for a fixed period of the project.

To demonstrate the required knowledge and skills the candidate should:

- ◆ create a project risk log, including:
  - description of project risks
  - allocation of risk owners
  - assessment of probability and impact of risks
  - actions to minimise likelihood of risks or to contain the impact of risks
- ◆ create logs to record, monitor and respond to changes and issues in a consistent manner
- ◆ provide updated logs and status reports on risks, changes and issues over two reporting periods

#### Assessment Guidelines

Ideally the assessment for this Outcome should be based on a real workplace project for which the candidate has responsibility. If this is not possible or the project is not suitable for assessment purposes then a simulated or case-study based project that derives from the workplace can be provided by the Centre.

Where a candidate wishes to use a real workplace project, selection should be made in consultation with their line manager and tutor. Suitability of the project for assessment purposes will be determined by the Centre.

If appropriate the candidate should use the same project for all Unit Outcomes.

The Centre will determine in discussion with the candidate an appropriate period of time over which the project should be monitored and controlled. It is suggested that this cover at least two reporting periods, eg months.

It is expected that the candidate will produce the following documents at the end of each reporting period as part of the evidence submission:

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- ◆ risk log and summary report on risk status to demonstrate the assessment, monitoring and reporting on risk
- ◆ checklist which identifies potential danger signals or project failure signs
- ◆ issue log to manage and control changes and incidents in a consistent manner

### Outcome 5

Evaluate and close a project

#### Knowledge and/or Skills

- ◆ Project evaluation
- ◆ Delivery and acceptance of project products
- ◆ Identification and distribution of lessons learned
- ◆ Follow-on actions and recommendations for further development
- ◆ Post project review
- ◆ Storage of project records

#### Evidence Requirements

The candidate must provide evidence to cover all knowledge and/or skills above by producing project documentation which demonstrates effective evaluation and the controlled and formal closure of a project.

To demonstrate the required knowledge and skills the candidate should:

- ◆ explain how it will be ensured that all products from a project have been delivered and accepted
- ◆ identify lessons learned from a project and describe the means by which they are distributed for the benefit of others
- ◆ create an end-of-project evaluation report which details how well the project has performed against its original and revised business cases and plans
- ◆ describe and justify any follow-on actions and recommendations for further development
- ◆ provide a plan for a post project review
- ◆ create a list of all records of a project and recommend suitable methods of storage and retrieval

#### Assessment Guidelines

Ideally the assessment for this Outcome should be based on a real workplace project for which the candidate has responsibility. If this is not possible or the project is not suitable for assessment purposes then a simulated or case-study based project that derives from the workplace can be provided by the Centre.

Where a candidate wishes to use a real workplace project, selection should be made in consultation with their line manager and tutor. Suitability of the project for assessment purposes will be determined by the Centre.

It is recommended that the candidate use the same project for all Unit Outcomes.

## Administrative Information

**Unit code:** HR0T 48

**Unit title:** Project Management: Managing the Implementation of a Project

**Superclass category:** AG

**Date of publication:** August 2017

**Version:** 01

### History of changes:

Version	Description of change	Date

**Source:** SQA

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**FURTHER INFORMATION:** Call SQA's Customer Contact Centre on 44 (0) 141 500 5030 or 0345 279 1000. Alternatively, complete our [Centre Feedback Form](#).

## **SQA Advanced Unit specification: support notes**

### **Unit title: Project Management: Managing the Implementation of a Project**

This part of the Unit specification is offered as guidance. The support notes are not mandatory.

While the exact time allocated to this Unit is at the discretion of the centre, the notional design length is 80 hours.

### **Guidance on the content and context for this Unit**

Project management plays a growing and increasingly important role in the development of a wide range of organisational needs and requirements in all situations such as government, construction, engineering, medicine, science, research and computing. The management of projects differs greatly from the management of day-to-day routine and repetitive systems and procedures, with constraints such as fixed start and finish dates, time schedules to be adhered to, budgets to be closely followed and managed as well as a team of highly skilled professionals to be co-ordinated and managed to achieve project goals and meet the quality standards and requirements of the client. There is therefore great pressure on project managers in all areas to manage all of these resources efficiently and effectively.

This Unit is intended for existing and aspiring project managers, as well as those who want to develop knowledge and skills in managing the implementation of a project. It is unlikely that they will already hold any formal project management qualifications. The unit aims to enable the management of the implementation of an approved and planned project; it also includes evaluation and formal closure of a project. .

The Unit is written in generic terms, since the concepts involved are applicable and valid in all contexts of project management. The terminology should be adapted to suit the relevant workplace situation.

This Unit has been designed to be delivered to employees who work in organisations which implement processes based on the Government's best practice guidelines and adopt practices that demonstrate good corporate governance. In this context, it is expected that support materials be compatible with the HM Treasury's Green Book guidance on Appraisal and Evaluation and reference the Gateway Review system, or similar, to assess project progress. However it is not compulsory for candidates to use the HM Treasury Green Book - it should only be used where appropriate. Candidates may also be encouraged to access the wide range of project management tools and guidance available through Cabinet Office Efficiency and Reform Group <https://www.gov.uk/government/publications/best-practice-and-methodology-projects-programmes-and-portfolios> or the Scottish Government <http://www.scotland.gov.uk/topics/government/programmeProjectDelivery>

Although the Unit includes a range of concepts, knowledge and skills, which will require that candidates be provided with a suitable and sufficiently wide range of exercises to practice with, a holistic approach should still be considered by means of a single project approach for the summative assessment.

This Unit also forms part of the PDA Diploma in Project Management which provides candidates with a natural progression route to other widely recognised professional project management qualifications such as PRINCE2 and the Diploma in Programme and Project Management.

### **Outcome 1**

This Outcome provides the knowledge and skills required to work and communicate effectively with a project team and other stakeholders. This includes an introduction on how to manage conflict and handle negotiations.

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### **Outcome 2**

This Outcome focuses on the financial management of a project. It covers the knowledge and skills required to create and update an initial project budget. In addition to the use of estimating and forecasting techniques to create and re-profile a budget during the life of a project, the candidate will be able to produce financial monitoring reports on project income, expenditure and budget variations.

### **Outcome 3**

Outcome 3 covers the requirements for the monitoring and controlling of the tasks and resources of a project including the quality of the project deliverables. The knowledge and skills provided include planning, scheduling and progress reporting against plans.

### **Outcome 4**

The purpose of this Outcome is to enable the candidate to determine and describe the way in which a project manages risks, issues and changes. This is supported by the creation and updating of a risk log, an issue log and production of regular monitoring reports.

### **Outcome 5**

This Outcome provides the knowledge and skills required to demonstrate the effective evaluation and formal closure of a project. This includes the development of the ability to assess the success of a project, share lessons learned, archive project documentation and plan post project activities.

## **Guidance on the delivery and assessment of this Unit**

This Unit is intended to be delivered as one of two Units within the PDA in Project Management although it can be delivered as a stand-alone Unit. It provides the candidate with the knowledge and skills required to run and complete a project which has been given approval to proceed to implementation. The resultant skills will enable the candidate to manage and control a project's resources including project relationships and the budget within the context of efficient management of risk and change.

The project could be from a candidate's place of work or from an organisation they are familiar with or from their personal life. However it must be suitable to be used as the basis of development and assessment for all five Outcomes. A live project may offer a more substantive experience for the candidate. Ideally this same project could be used to progress further project management knowledge and skills through the other Unit within the PDA. If this is not possible or the project is not suitable for assessment purposes then a simulated or case-study based project can be provided by the Centre. Where a candidate wishes to use a real workplace project, selection should be made in consultation with their line manager and tutor. Suitability of the project for assessment purposes will be determined by the Centre.

This Unit consists of five Outcomes, which develop progressively the knowledge and skills required to control the people, budget, tasks, risks and closure of a project. As such, it is recommended that a single workplace project be used to assess the candidate's competence in the requirements of the Unit. It is at the discretion of the centre however whether a single assessment is used or whether several assessments are used, in stages, matching the sequence of the Outcomes.

It is intended that delivery of this Unit be based on practice with a suitable and sufficiently wide range of exercises, simulations and case studies to support this approach. Where possible all assessments should be based on real project requirements and developments. Where this is not possible or there is a shortfall in the scope for assessment purposes then this can be replaced or supplemented with case study material provided by the Centre. Candidates should be given project management experiences which are as real as possible.

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Where possible it would be advantageous to the candidate if Outcome 2 could be delivered in the context of the payment and authorisation processes of an organisation.

The choice of project management methodology, eg PRINCE2, DSDM, adopted for use in the Units within this PDA is at the discretion of the Centre. However the project management processes and techniques taught within this Unit should provide a straightforward and practical approach for managing and controlling projects. The methodology selected should provide a consistent approach and enable candidates to maintain sufficient management control and determine facts about progress, risks and achievements.

In-depth study and application of project planning and scheduling techniques is not required for this Unit. Straightforward techniques should be used to produce a project plan which presents a timeline identifying stages, key project tasks, milestones and deliverables. For example, the project plan could be produced using spreadsheet software and presented as a Gantt chart. For candidates who wish to progress to develop the skills to develop and manage a project plan using commercially available project management software such as MS Project there are other Units in the SQA SQA Advanced portfolio specifically designed for this purpose.

### ***Opportunities for developing Core Skills***

There may be opportunities to gather evidence towards Core Skills in this Unit, although there is no automatic certification of Core Skills or Core Skills components.

The general aims of the PDA in Project Management include developing a range of personal and key skills which will improve ability, confidence and employability. All practical teaching and learning activities of the course provide a context for developing and enhancing all five Core Skills, in particular some of the Core Skills components in *Communication*, *Working with Others* and *Problem Solving*. For example, many discrete Core Skill elements can be developed within the context of assessment. For example, the use of technology as a tool to support budgeting, planning, record keeping and presentation of reports is central to the Award. Also, planning, organising and evaluating work and listening and talking with a wide range of people is essential.

IT and Numeracy may feature strongly depending on the nature of the project selected and on the sector of commerce or industry of relevance to the candidate.

## **Open learning**

This Unit is suitable for delivery by open or distance learning methods provided that any necessary additional planning and resources are made available for candidate support, assessment and quality assurance. A combination of new and traditional authentication tools may have to be devised for assessment and re-assessment purposes. For further information and advice, please see *Assessment and Quality Assurance for Open and Distance Learning* (SQA, February 2001 — publication code A1030).

## **Candidates with additional support needs**

The additional support needs of individual candidates should be taken into account when planning learning experiences, selecting assessment instruments, or considering alternative Outcomes for Units. Further advice can be found in the SQA document *Guidance on Assessment Arrangements for Candidates with Disabilities and/or Additional Support Needs* ([www.sqa.org.uk](http://www.sqa.org.uk)).

## General information for candidates

### Unit title: Project Management: Managing the Implementation of a Project

The purpose of this Unit is to provide you with the knowledge and skills required to run and complete a project which has been given approval to proceed to implementation. The resultant skills will enable you to manage and control project resources including project relationships and the budget within the context of efficient management of risk and change.

This unit is suitable for those already holding a project management role, as well as aspiring project managers who wish to develop skills and knowledge in managing the implementation of projects. The selection of a suitable project will be agreed by your tutor and it could be either a work related project or one from your personal life.

In Outcome 1 you will cover the knowledge and skills required to work and communicate effectively with a project team and other stakeholders. This includes an introduction on how to manage conflict and handle negotiations.

In Outcome 2 you will focus on the financial management of a project. It covers the knowledge and skills required to create an initial project budget. In addition to the use of estimating and forecasting techniques to create and re-profile the budget during the life of the project, you will be able to produce financial monitoring reports on project income, expenditure and budget variations.

Outcome 3 covers the requirements for the monitoring and controlling of the tasks and resources of a project including the quality of the project deliverables. Additional knowledge and skills provided include planning, scheduling and progress reporting against plans.

Outcome 4 will enable you to determine and describe the way in which a project manages risks, issues and changes. This includes the creation and updating of a risk log, an issue log and production of regular monitoring reports.

Finally, Outcome 5 will provide you with the knowledge and skills required to demonstrate the effective evaluation and formal closure of a project. This includes the development of the ability to assess the success of a project, share lessons learned, archive project documentation and plan post project activities.

You will learn these skills by means of formative practical exercises throughout, and be assessed either at the end of each Outcome or with summative assessments incorporating two or more of the five Outcomes. In order to complete this Unit successfully you will be required to achieve a satisfactory level of performance in all assessed work.

This Unit is one of two Units in the PDA in Project Management at SCQF level 8. The PDA may provide you with the first steps in the development of your project management skills and enable you to progress in due course to other widely recognised professional project management qualifications such as PRINCE2 and the Diploma in Programme and Project Management.