

COSBEDMO06 - SQA Unit Code FM78 04

Manage the brief, development programme and project risks and opportunities in built environment design management



Overview

This unit is concerned with managing the project brief and a suitable development programme taking into account project risks and opportunities. It covers preparing, presenting and agreeing a project brief with stakeholders. You must be able to identify and agree the stakeholder requirements, research, prepare and present the brief.

You should be able to negotiate modifications to the brief after presentation to stakeholders. It is about using the project brief to formulate a development programme which incorporates the information and constraints of the brief.

You must be able to check the contents of the brief and prepare a detailed development programme which meets stakeholder's expectations. It is about using the project information to identify, assess and manage project risks and opportunities. Finally, you must be able to obtain and review risks and opportunities and their relative significance and to identify the resources necessary to implement these processes.

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Performance criteria

Prepare and agree a project brief

You must be able to:

- P1 identify and agree the stakeholders requirements and prepare a framework for the project brief
- P2 define and agree with the stakeholders the information required to make effective decisions about the project
- P3 check any relevant investigations which have already been made, identify information which is not valid, and obtain additional valid information which is needed
- P4 select data which is relevant and valid, analyse it and qualify its status
- 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 framework constraints, opportunities and areas of uncertainty
- P7 modify the draft to reflect the discussion and relevant points which have been agreed
- P8 negotiate a clear and mutually acceptable agreement on the brief which has sufficient detail to allow the next stage of the project to start

Identify, assess and manage project risks and opportunities

You must be able to:

- P9 identify and review project information relating to risks and opportunities arising from project stages
- P10 obtain information on any risks and opportunities relating to the project
- P11 identify and assess the significance of the risks and opportunities
- P12 select the most effective methods and procedures to manage risks and exploit opportunities that comply with all relevant regulations and guidelines
- P13 identify the resources that are necessary to implement methods to manage risks and exploit opportunities
- P14 identify and specify clearly the procedures for implementing the management methods
- P15 implement and maintain the management methods and procedures and modify them to meet changed circumstances

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Knowledge and understanding

You need to know and understand:

Prepare and agree a project brief

- K1 what to identify as stakeholders' requirements (understanding)
- K2 how to agree the stakeholders' requirements (evaluation)
- K3 how to prepare a framework for the project brief (application)
- K4 how to define and agree with the stakeholders the information required to make effective decisions about the project (evaluation)
- K5 how to check any relevant investigations which have already been made (application)
- K6 what to identify as information which is not valid (understanding)
- K7 how to obtain additional valid information which is needed (application)
- K8 how and why to select data which is relevant and valid, analyse it and qualify its status (evaluation)
- K9 how to prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to stakeholders (application)
- K10 how to explain and discuss any significant framework constraints, opportunities and areas of uncertainty (application)
- K11 how to modify the draft to reflect the discussion and relevant points which have been agreed (application)
- K12 how and why to negotiate a clear and mutually acceptable agreement on the brief which has sufficient detail to allow the next stage of the project to start (synthesis)

Identify, assess and manage project risks and opportunities

You need to know and understand:

- K13 what to identify as project information relating to risks and opportunities arising from project stages (understanding)
- K14 how and why to review project information relating to risks and opportunities arising from project stages (analysis)
- K15 how to obtain information on any risks and opportunities relating to the project (application)
- K16 what to identify as the significance of the risks and opportunities (synthesis)

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- K17 how and why to assess the significance of the risks and opportunities (analysis)
- K18 how and why to select the most effective methods and procedures to manage risks and exploit opportunities that comply with all relevant regulations and guidelines (evaluation)
- K19 what to identify as the resources that are necessary to implement methods to manage risks and exploit opportunities (understanding)
- K20 what to identify as the procedures for implementing the management methods (understanding)
- K21 how and why to specify clearly the procedures for implementing the management methods (evaluation)
- K22 how to implement and maintain the management methods and procedures and modify them to meet changed circumstances (application)

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Additional Information

Scope/range

Prepare and agree a project brief

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 groups

2. Requirements:

- 2.1. the client
- 2.2. user and accessibility
- 2.3. ergonomic
- 2.4. community
- 2.5. procurement
- 2.6. physical
- 2.7. resource
- 2.8. construction
- 2.9. regulatory
- 2.10. cost
- 2.11. timescale
- 2.12. risk factors
- 2.13. health, safety and welfare
- 2.14. environmental
- 2.15. current and future needs
- 2.16. functional requirements
- 2.17. energy, water and natural resource management
- 2.18. reduce emissions
- 2.19. carbon use
- 2.20. compliance with local, regional national development strategies
- 2.21. Building Information Modelling

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2.22. opportunities associated with new technologies

2.23. adaptation and mitigation

2.24. demolition strategies

3. Data:

3.1. relevant investigations

3.2. critical design parameters

3.3. the scale and sensitivity of the project

4. Analyse:

4.1. comparison with similar projects

4.2. standard checklists

4.3. reference to relevant comparative research

5. Present:

5.1. orally

5.2. in writing

5.3. graphically

5.4. electronically

6. Identify, assess and manage project risks and opportunities

7. Project information:

7.1. environmental

7.2. statutory and legal requirements

7.3. client, user and community requirements

7.4. construction and technical requirements

7.5. site constraints

7.6. finance, procurement and contract

7.7. quality

7.8. cost

7.9. timescale

8. Risks and opportunities:

8.1. resources

8.2. communications

8.3. cost

8.4. quality

8.5. natural and built environment

8.6. users, public and third parties

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- 8.7. health, safety and welfare
- 8.8. complexity and scope
- 8.9. consents
- 8.10. business
- 8.11. technical considerations
- 8.12. timescale
- 8.13. contract
- 8.14. funding
- 8.15. site conditions and circumstances
- 8.16. carbon use
- 8.17. workforce competence
- 8.18. team composition
- 8.19. management and communication of information
- 8.20. cost benefit analysis
- 8.21. opportunities associated with new technologies

9. Project stages:

- 9.1. Stage 0 (Strategy)
- 9.2. Stage 1 (Brief)
- 9.3. Stage 2 (Concept)
- 9.4. Stage 3 (Definition)
- 9.5. Stage 4 (Design)
- 9.6. Stage 5 (Build and Commission)
- 9.7. Stage 6 (Handover and Closeout)
- 9.8. Stage 7 (Operations and End of Life)

10. Manage risks:

- 10.1. risk identification
- 10.2. risk assessment
- 10.3. risk register
- 10.4. eliminate/minimise risks
- 10.5. control risks at source
- 10.6. cumulative protection
- 10.7. mitigate
- 10.8. allocation of responsibility

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11. Exploit opportunities:

- 11.1. innovation
- 11.2. planning gain
- 11.3. standardisation
- 11.4. life cycle costing
- 11.5. cost benefit analysis
- 11.6. value management
- 11.7. adaptation
- 11.8. alteration
- 11.9. integration
- 11.10. impact on the natural and built environment
- 11.11. impact on users, public and third parties
- 11.12. improved quality
- 11.13. procurement
- 11.14. timescale reduction
- 11.15. specification change

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