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## Overview

This unit is about deciding what your team needs to be able to do, producing a specification for the team's selection, and ensuring that the recruitment process concludes in satisfactory contracts. You must be able to negotiate proposals for team membership, and follow the process through to the appointment of the people. It is about briefing the project team. You must be able to agree the team's work allocation, motivate them to achieve it, and agree with them how you will monitor their performance.

**Performance criteria**

*You must be able to:*

**Select and form a project team**

- P1 identify the **services** and **resources** that are needed, and select those people that meet the agreed timescales and budget limits
- P2 negotiate and recommend proposals for team membership which are likely to produce an effective team
- P3 **evaluate services** and **resources** and circulate the results to decision makers
- P4 follow the procedures for obtaining **services** and **resources**
- P5 produce appropriate **contractual arrangements** and **terms of appointment** for the organisations and people selected and confirming the arrangements in writing with stakeholders
- P6 negotiate contracts and agreements in a way which preserves goodwill and trust

**Induct and inform a project team**

*You must be able to:*

- P7 inform the **project team** on the purpose, process and intended results of team activities
- P8 confirm the **roles** and capabilities of all the people involved in the project
- P9 agree within the **project team** the allocation and control of responsibilities and pass this information on to the people who need it
- P10 discuss and confirm the **project programme** with the **project team**
- P11 agree with the **stakeholders** and the project team, changes to the brief and **project programme** which improve the effectiveness of the results and the efficiency of the process
- P12 select and specify **methods of project monitoring** which are suitable for the projects timescale, cost and quality, and explain the **method** to the **project team**

**Knowledge and understanding**

*You need to know and understand:*

**Select and form a project team**

- K1 what to identify as the **services** and **resources** that are needed (understanding)
- K2 how and why to select those people that meet the agreed timescales and budget limits (evaluation)
- K3 how and why to negotiate and recommend proposals for team membership which are likely to produce an effective team (synthesis)
- K4 how and why to **evaluate services** and **resources** (evaluation)
- K5 how to circulate the results of evaluations to decision makers (application)
- K6 how to follow the procedures for obtaining **services** and **resources** (application)
- K7 how to produce appropriate **contractual arrangements** and **terms of appointment** for the organisations and people selected and confirm the arrangements in writing with stakeholders (application)
- K8 how and why to negotiate contracts and agreements in a way which preserves goodwill and trust (synthesis)

**Induct and inform a project team**

*You need to know and understand:*

- K9 how to inform the **project team** on the purpose, process and intended results of team activities (application)
- K10 how to confirm the **roles** and capabilities of all the people involved in the project (application)
- K11 how and why to agree within the **project team** the allocation and control of responsibilities
- K12 how to pass on information on the allocation and control of responsibilities on to the people who need it (application)
- K13 how and why to discuss and confirm the **project programme** with the **project team** (synthesis)
- K14 how to confirm the **project programme** with the **project team** (application)
- K15 how and why to agree with the **stakeholders** and the project team, changes to the brief and **project programme** which improve the effectiveness of the results and the efficiency of the process (evaluation)
- K16 how and why to select and specify **methods of project monitoring** which are suitable for the projects timescale, cost and quality, and explain the **method** to the **project team** (evaluation)

**Scope/range**

**Select and form a project team**

- 1 Services:
  - 1.1 project management
  - 1.2 design
  - 1.3 consultants/contractors
- 2 Resources:
  - 2.1 people;
  - 2.2 materials
  - 2.3 plant and equipment
  - 2.4 facilities
  - 2.5 collaborative IT
- 3 Evaluate:
  - 3.1 quality
  - 3.2 price
  - 3.3 value
  - 3.4 time
  - 3.5 reliability
  - 3.6 competence
- 4 Contractual arrangements:
  - 4.1 definition and coverage of required project services
  - 4.2 roles and responsibilities for procurement
  - 4.3 alignment of interests and benefits
  - 4.4 early participation of key suppliers
  - 4.5 integrated project insurance
  - 4.6 agreed payment procedures
  - 4.7 open book accounting
  - 4.8 supply chain accounting
  - 4.9 working across discipline boundaries
  - 4.10 BIM protocols
  - 4.11 risk allocation
  - 4.12 novation arrangements
- 5 Terms of appointment:
  - 5.1 scope

**Scope/range**

- 5.2 cost
- 5.3 deliverables
- 5.4 timescale

**Induct and inform a project team**

- 6 Project team:
  - 6.1 design and development consultants
  - 6.2 potential contractors
  - 6.3 potential subcontractors and suppliers
  - 6.4 client
  - 6.5 facility/asset managers
- 7 Roles in:
  - 7.1 aspects of design
  - 7.2 health and safety
  - 7.3 statutory and other approvals
  - 7.4 procurement
  - 7.5 coordination
  - 7.6 quality assurance
  - 7.7 team working
  - 7.8 working across disciplines
  - 7.9 information management
  - 7.10 facilities/asset management
- 8 Project programme:
  - 8.1 project execution plan
  - 8.2 objectives and targets
  - 8.3 key decision stages
  - 8.4 scheduling and timetabling
  - 8.5 delivery of development documentation
  - 8.6 statutory approvals
  - 8.7 development team meetings
  - 8.8 procurement
- 9 Stakeholders:
  - 9.1 the client

**Scope/range**

- 9.2 financial advisers/investors and funders
- 9.3 design consultants
- 9.4 potential contractors
- 9.5 potential subcontractors and suppliers
- 9.6 independent client advisers
- 9.7 facility/asset managers
- 9.8 user groups
- 9.9 community groups
- 10 Methods of project monitoring:
  - 10.1 exchange, coordinate and control information
  - 10.2 BIM protocols
  - 10.3 checks and approvals
  - 10.4 meetings
  - 10.5 reporting

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Form and induct a project team in built environment  
design management

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**Relevant occupations** Architects; civil engineers; graphic designers; architectural technologists, town planning technicians and building surveyors

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**Suite** Built Environment Design Management

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