

Occupation Profile

for the Graduate Apprenticeship in Project Management at SCQF Level 10

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Purpose:

This occupation profile consists of 17 work situations routinely carried out in Project Management roles at this level. Collectively these describe all the performance requirements and knowledge and understanding requirements apprentices need to demonstrate competence in the occupation. Each work situation is set out as follows:

- Work situation title, goal, brief outline, performance requirements and knowledge and understanding requirements
- Meta-skills
- National Occupational Standards



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Work Situation

Contributing to the management of risks

Goal of work situation: To mitigate against and minimise the impact of unplanned events on project delivery in line with health and safety and organisational requirements.

Brief outline: This involves ongoing identification, recording and review of risks in line with organisational requirements for risk management. It includes identification of risks, assessment of the likelihood and impact of these risks, and consideration of how risks can be minimised or mitigated against. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Inviting relevant stakeholders to participate in risk and opportunity discussions
2. Identifying project risks, assessing their likelihood and impact, and identifying potential mitigations
3. Allocating risk owners to all identified risks
4. Developing and updating plans to manage risks
5. Agreeing mitigation activity required to reduce or eliminate long-term risk
6. Developing contingency plans to respond to accepted risks
7. Reviewing and updating the risk register on a regular basis, closing off risks that have reduced to zero likelihood
8. Monitoring and reporting on the impact of risk on cost, schedule, risk analysts, time and liability

Knowledge and understanding requirements

1. The general principles of risk management and the importance of completing a risk assessment including how and when to do this
2. The purpose and format of the risk management plan and risk register
3. Why they must consider factors including costs, time, reputational, health and safety, environmental, political, scope, proximity when determining the potential impact of project risks
4. Risk impact and assessment criteria and how to use these for risk mitigation
5. Potential effects of risks on the project including costs, time and reputation
6. How to allocate budget to each risk and the implications of additional expenditure on project risk
7. Project threats and opportunities for the project which are external to the organisation
8. The tools and techniques for identifying, analysing, monitoring and reviewing project risks and how to use them
9. How and when to escalate risk-related issues to management or project sponsor
10. Factors affecting the ways in which risks can change and be rated during a project
11. The importance of reviewing and updating plans for managing project risks including when and how to do this
12. The importance of following organisational health and safety procedures and policies

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Identify, analyse and plan responses to project risks (ECIPMC2)
- Monitor and review risk management strategies, policies and processes (CFARMA006)

Work Situation

Developing and maintaining business cases

Goal of work situation: To prepare, develop and maintain business cases and resource requirements to gain approval, investment and support in line with organisational strategy and regulatory requirements.

Brief outline: This involves the development of business cases that justify the start or continuation of projects or programmes in terms of benefits, costs, and risks. It includes refining and updating business cases, ensuring alignment of project or programme objectives and continued validity with changing strategic priorities. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Collaborating with colleagues and other internal and external stakeholders to gather information to be included in business cases
2. Developing project objectives to align with strategic priorities
3. Appraising project options to identify preferred options
4. Determining benefits or drawbacks expected from a project
5. Establishing baseline scope on which project performance can be assessed
6. Undertaking impact assessments of projects in line with organisational policy and regulatory requirements to minimise negative outcomes
7. Developing project implementation documents that set out project controls and tolerances
8. Developing formal project documentation for approvals
9. Gaining approval of project business cases
10. Managing business cases, implementing changes, and recording in line with agreed change control processes

Knowledge and understanding requirements

1. Project context including internal and external environment and influences
2. Good practice and relevant organisational objectives, strategies, and procedures for developing business cases and how to apply them
3. Areas business cases need to cover and any necessary supporting information including resource requirements, financial models, budget, and risks
4. How to determine internal and external resource requirements
5. How to identify interdependencies with other projects, programmes, and business initiatives
6. How to prepare project implementation documents
7. Why it is necessary to revise business cases and resource requirements when there are project changes
8. Levels of complexity in projects or programmes and the effect these have on the business case
9. How to carry out impact assessments for business cases – including equality impact assessments, sustainability impact assessments and deliverability impact assessments
10. How to gather and manipulate data in support of business cases
11. Organisational processes for approval and management of business cases

National Occupational Standards

This work situation aligns to the following National Occupational Standards:-

- Establish and monitor the project requirements of the project management team (ECIPMA3)
- Prepare the business case for the project (ECIPMB6)
- Identify and obtain internal project resources (ECIPMD10)
- Estimate and specify project resources (ECIPMC3)
- Identify and establish procedures and responsibilities for the project (ECIPMC5)

Work Situation

Developing personal professionalism

Goal of work situation: This is about taking responsibility for agreeing realistic targets, reflecting on and learning from challenges and success, and using feedback for improvement.

Brief outline: To develop personally and professionally and improve work performance in line with organisational requirements. This involves self-reflecting on performance, participating in performance reviews, identifying development activities and acting on feedback. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Reflecting on own performance to identify strengths and areas for development
2. Participating in regular performance reviews in line with organisational processes
3. Setting and agreeing personal development goals and plans that respond to identified strengths and areas for development
4. Researching and planning development activities to improve own performance
5. Participating in formal and informal activities to support own development
6. Seeking and acting on feedback to support own development
7. Recording development, including performance impact and other benefits, in line with organisational processes

Knowledge and understanding requirements

1. Setting and agreeing SMART (Specific, Measurable, Achievable, Realistic, Time-bound) goals for performance and development
2. The knowledge, skills and behaviours required in work and how to identify own gaps in these
3. How to prepare development plans
4. Sources of up-to-date and appropriate information to support own development
5. Importance of career and personal goals, including collective organisational learning, when planning own development
6. How to record own development in line with organisational processes and key performance indicators for personal and professional development
7. How to obtain feedback on own performance and why this is important
8. Approaches to mentoring and coaching and how these can support own development
9. Different learning models and styles and how to apply them

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Manage personal development and reflect on current practice (SFJ HA203)

Work Situation

Estimating project costs and developing budgets

Goal of work situation: To develop and agree project budgets, and to control forecast and actual costs against budgets.

Brief outline: This involves the estimation of costs, setting of agreed budgets, and controlling of forecast and actual costs against budgets. This covers areas such as cost management, financial reporting and accuracy of estimation. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Estimating projects in line with project plans
2. Presenting estimation information to stakeholders to support project budget development
3. Establishing project budgets that align with project plans and scale
4. Monitoring and reviewing accuracy of estimation before, during and at the end of projects
5. Monitoring budgets and agreeing revisions
6. Analysing and reporting on financial performance against project plans and budgets

Knowledge and understanding requirements

1. Estimation processes and techniques including bottom-up estimating, comparative estimating, parametric estimating and 3-point estimating
2. How to estimate through the project life cycle and the changing accuracy of estimates through this process
3. The link between cost estimating and budgeting and cost management including the benefits of cost management
4. Types of financial tools and how to use them, including financial spreadsheets and budgets
5. The importance of planned expenditure, actual expenditure, cash flow forecast, forecast outturn costs and cost control and reporting
6. Financial terminology including direct and indirect costs, fixed and variable costs, variances, and terms such as earned value management and return on investment
7. Financial breakdown and how costs build up
8. How to prepare budgets based on the business case
9. How to allocate budgets to cover different costs such as labour, materials, and services
10. How to agree revisions to budgets and communicate revisions to others
11. How to prepare and implement contingency plans
12. Financial reporting processes, including frequency and level of reporting

National Occupational Standards

This work situation aligns to the following National Occupational Standards:-

- Estimate and specify project resources (ECIPMC3)
- Review and monitor the financial control of the project (ECIPMD5)

Work Situation

Leading and managing teams

Goal of work situation: To lead and manage teams to deliver objectives in line with organisational requirements.

Brief outline: This involves providing direction, encouraging teamwork, and aligning activity to organisational objectives. This covers areas such as leadership models and styles, empowerment and principles of team development. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Agreeing team goals and individual roles and responsibilities with team members in line with objectives
2. Monitoring team performance and providing additional direction as required to meet objectives
3. Developing and maintaining positive working relationships and effective teamworking to achieve objectives
4. Empowering and inspiring team members to deliver individual objectives
5. Monitoring team compliance with relevant professional codes of conduct and organisational policies and procedures
6. Identifying and reporting on potential or actual cases of professional malpractice and escalating issues in line with organisational procedures

Knowledge and understanding requirements

1. The maturity of teams and team development stages and approaches
2. Approaches to leadership and situations where they are applicable
3. Internal and external communication including type, style, and tactics
4. The importance of keeping team members informed including team meetings and social time
5. Principles of team development including building positive and effective teams
6. Different theories of motivation
7. Approaches to managing and resolving differences and disagreements using organisational processes
8. Relevant national and international legal, regulatory, ethical, and social requirements, including the impact they have on own area of responsibility and the consequences of non-compliance
9. Different management structures that can be used
10. The importance of identifying and supporting team members' personal development on project success
11. Professional codes of conduct and why they are important
12. Leadership models, styles, qualities, and self-awareness

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Identify and establish procedures and responsibilities for the project (ECIPMC5)
- Provide leadership to the project (ECIPMD13)
- Establish the project management team's working methods (ECIPMA4)
- Build teams and allocate work to team members (INSML024)
- Provide leadership to your team (INSML005)

Work Situation

Managing change control processes

Goal of work situation: To manage a project or programme by escalating and managing any changes to the original baseline position in line with organisation and regulatory requirements.

Brief outline: This involves the process of managing, reporting, and gaining approval for proposed changes to the baseline scope of a project or programme. It includes the establishment of protocols for dealing with changes that are outwith agreed tolerances. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Agreeing change control and escalation processes for projects and programmes with sponsors
2. Identifying changes that are outwith agreed tolerances to implement agreed change control and escalation processes
3. Assessing all options for proposed change against their impact
4. Reporting the potential impact of changes to senior stakeholders to establish realistic expectations
5. Amending project parameters to reflect changes to benefits, timelines, quality, or resources
6. Amending project management documentation, scheduling, and communication plans to reflect changes in scope
7. Using change control processes to manage changes in line with organisational best practice
8. Assessing the risks of changes to inform decision making
9. Identifying and resolving any issues that are causing project or programme scope change
10. Analysing changes to determine their impact on the project or programme
11. Escalating problems and changes using agreed governance arrangements
12. Making recommendations based on impact assessments on whether to approve, reject or defer changes, or to request further information

Knowledge and understanding requirements

1. Organisational change management processes and procedures
2. The importance of establishing agreed change control processes
3. Why change occurs and the increasing cost of making changes as projects evolve through the project lifecycle
4. Organisational change management documentation and how to complete this
5. How project implementation continues, prior to decisions being made on change
6. How to analyse the impact of changes to projects or programmes
7. The impact of changes on project or programme delivery
8. The impact of changes on quality, time, resource, and outcomes and benefits
9. How to assess and mitigate risks
10. How to create and justify recommendations on whether to approve, reject or defer changes to a project or programme
11. The organisation's project governance and escalation procedures

13. Gaining approval, rejection, or deferral for changes to scope using agreed governance arrangements

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Manage agreed project changes (ECIPMD4)

Work Situation

Managing project governance and reporting

Goal of work situation: To manage project governance and reporting activities, in line with organisational and regulatory requirements.

Brief outline: This involves working with stakeholders to establish and comply with governance arrangements for projects. It includes monitoring and reporting on progress to inform decision making. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Defining project roles and responsibilities at the start of projects in line with project plans
2. Establishing project and Programme Board structures and arrangements to manage governance and decision making
3. Establishing reporting arrangements, supported by procedures and controls and aligned to governance arrangements
4. Agreeing decision points for review of business cases
5. Mapping stakeholders in relation to their influence and interests
6. Communicating key messages to keep stakeholders engaged and supportive of projects
7. Gathering information for stakeholders to inform decision making
8. Identifying deviations from agreed schedules and budgets to inform decision making
9. Producing executive reports that summarise findings and recommendations effectively to inform decision making
10. Analysing reports, including data and trends to inform decision making
11. Storing and filing documents so they can be located when required
12. Reporting on progress to relevant stakeholders
13. Escalating risks and issues in accordance with agreed governance procedures
14. Conducting closure procedures to finalise activity
15. Capturing lessons learned and identifying unplanned or additional benefits through implementation to inform future activity

Knowledge and understanding requirements

1. The importance of governance systems and procedures
2. The set up and management of governance structures and submission deadlines
3. Differences between project, programme, and portfolio
4. The importance of having clearly defined roles, responsibilities and accountabilities that align with organisational structure
5. Project management business processes and frameworks
6. Project scope in relation to budget approval; timescale acceptance; risk acceptance; and change control
7. Processes and responsibilities for approving project plans
8. How to source information from systems and other departments
9. Project benefits and disadvantages and how to identify these
10. Project tolerances and how to manage these
11. Levels and frequency of reporting and project review structure
12. Approaches to reactive and gated escalation
13. Procedures to follow for project closure and how to apply them
14. The organisation's key performance indicators (KPIs) and how they are measured
15. How to identify and respond to deviations from agreed schedules and budgets
16. Formal change control processes and how to use these
17. How to manage stakeholder expectations
18. Different ways, formats and frequencies of reporting and presenting management and stakeholders with information

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Establish and monitor the project requirements of the project management team (ECIPMA3)
- Manage project activities and resources (ECIPMD12)
- Manage the project management team (ECIPMA5)
- Monitor and review project progress (ECIPMD2)
- Monitor and review project risks (ECIPMD7)
- Review and monitor the financial control of the project (ECIPMD5)

Work Situation

Managing project handover and closure

Goal of work situation: To transfer responsibility for projects and close projects down in an orderly manner in line with organisation and regulatory requirements.

Brief outline: This involves managing the formal and informal tasks needed prior to project closure to transfer responsibility and confirm user acceptance for a project or its product. These tasks include completion of handover documentation, managing finances and achieving a smooth transition. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Agreeing the rationale to close projects with stakeholders
2. Verifying project objectives have been achieved to the agreed schedules, costs, and quality prior to closure
3. Agreeing project closure arrangements, including handover documentation, with partners and project stakeholders
4. Agreeing the activities to be transferred to “business as usual” operations
5. Preparing agreed project closure documentation prior to handover
6. Sharing agreed handover documentation with project stakeholders
7. Handing over all deliverables according to agreed procedures
8. Authorising the completion of all necessary procedures relating to finance, resources, and personnel
9. Completing all records and documents relating to projects to store for future audit
10. Scoping, scheduling, and agreeing post implementation reviews with project stakeholders
11. Carrying out and documenting post implementation reviews
12. Disseminating lessons learned to agreed stakeholders
13. Closing all associated project work in accordance with project plans

Knowledge and understanding requirements

1. The plans and timescales for project closure
2. The organisation’s project closure procedures, who needs to be involved in them, and how contracts can be closed
3. How to manage people and redeploy resources during the closure process
4. The difference between the role of the Project Manager and the continuing operational role, and the need for a transfer of responsibility
5. How to lead the project team through a period of transition
6. How to meet the needs of stakeholders during the transition to “business as usual”
7. The importance of achieving a smooth handover as the project becomes operational
8. The procedures for managing finance and resources, which need to be followed at project closure
9. The project closure and handover records and documents which need to be completed
10. The organisational procedures for storing records and documents for future use
11. The purpose of post implementation reviews and how to conduct and document them

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Manage project closure (ECIPME1)
- Manage handover of the project's deliverables (ECIPME2)
- Review the project and capture lessons learned (ECIPME3)

Work Situation

Managing quality processes

Goal of work situation: To use agreed quality processes to ensure products, processes or services are delivered effectively, efficiently and in line with organisational and regulatory requirements.

Brief outline: This is about individuals developing quality management plans and applying and maintaining quality management processes. It includes ensuring records are maintained and areas of non-compliance are responded to. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Setting and agreeing quality indicators to monitor and assess processes in line with business cases and stakeholder feedback
2. Preparing quality management plans in line with organisational requirements to enable personnel to carry out quality management and quality assurance activities
3. Managing quality assurance processes to confirm consistent application of procedures and standards set out in quality management plans
4. Managing quality control processes to determine whether success criteria are met
5. Responding to non-compliance to rectify issues
6. Identifying lessons learned to contribute to continuous improvement
7. Documenting quality management activities in line with plans and organisational requirements
8. Responding to actions of quality management in line with agreed change control processes

Knowledge and understanding requirements

1. Characteristics of effective quality indicators and how these relate to the business case and stakeholder interests
2. Quality management processes, metrics and relevant standards and how to apply these
3. How to develop quality management plans for processes and change initiatives
4. How to identify and respond effectively to areas of non-compliance
5. Industry standard quality control approaches and how to use these
6. How to use inspection processes and analytical tools in quality management
7. Change control procedures and how to use these
8. Principles of continuous improvement and how to apply these

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Carry out and participate in quality audits (INSML054)
- Improve the performance of the supply chain (SFL78)

Work Situation

Managing stakeholder engagement and collaboration

Goal of work situation: To ensure all required stakeholders are engaged and collaborative, key messages are communicated and accepted, and stakeholders work collectively to achieve agreed outcomes in line with organisation and regulatory requirements.

Brief outline: This is about managing and developing effective stakeholder relationships to support engagement and collaboration using agile methods and processes. This requires communication of key messages internally and externally to ensure that success criteria and inter-dependencies are understood, and expectations are managed. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Classifying stakeholders to distinguish their roles within activities
2. Engaging with internal and external stakeholders to secure collaboration
3. Liaising with and assisting product owners, stakeholders, designers and developers to agree product requirements and sustain collaboration
4. Leading and facilitating stakeholder management meetings
5. Leading requirements reviews with teams
6. Evaluating and synthesising outputs of meetings and reviews to prepare business-ready teams
7. Estimating business impact of changes across relevant business teams within the organisation
8. Providing colleagues and product users with implementation support
9. Maintaining effective working relationships with internal and external stakeholders
10. Escalating issues where appropriate

Knowledge and understanding requirements

1. How to determine the goals and parameters of the activity
2. The organisational policies, plans and procedures relating to work with stakeholders and how to apply them
3. How to produce and use stakeholder maps
4. The characteristics of stakeholders, how they behave, how they interact and what 'drives' them, and how to accommodate their individual differences
5. The tools and techniques to communicate with and manage stakeholders and how to apply them to achieve best business outcomes
6. Types of information required to support communications and where to find this
7. The organisational networks relevant to particular issues, and how to utilise networks to influence and make support collaboration
8. Planning and organisation techniques and how to apply them
9. Effective ways of delivering difficult messages
10. The importance of using lessons learned from previous similar work and applying these outputs to the current activities
11. Agile processes and methodologies and how to apply these
12. How to identify subject matter experts

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Manage business processes (INSML044)
- Develop and sustain working relationships with colleagues and stakeholders (INSML031)
- Develop and sustain collaborative relationships with departments and other organisations (INSML032)
- Manage the project management team (ECIPMA5)
- Identify and establish procedures and responsibilities for the project (ECIPMC5)

Work Situation

Monitoring and controlling projects

Goal of work situation: To track and monitor progress and control all aspects of the project to ensure objectives are met in line with organisational requirements.

Brief outline: This is about monitoring and controlling all aspects of the project. This involves understanding project data, tracking and reporting progress to stakeholders, implementing corrective actions, maintaining change logs. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Reviewing performance against project scope and project baseline
2. Updating schedules, costs, and deliverables in line with progress made
3. Developing reporting arrangements appropriate to project scale and scope
4. Monitoring and controlling financial aspects of projects against plans and budget
5. Monitoring project activities in line with agreed project scope and milestones
6. Identifying and documenting any deviations from agreed project plan and communicate changes to relevant stakeholders
7. Agreeing and implementing agreed corrective actions in response to deviations
8. Preparing change management plans that set out each stage of the agreed change control process
9. Creating and maintaining change logs to provide an audit trail for actions taken
10. Reporting on project performance
11. Providing stakeholders with timely information on progress

Knowledge and understanding requirements

1. The importance of monitoring and controlling project performance, including accountabilities
2. The principles and various forms of project reporting
3. Different types and application of project methodologies to monitor and control projects
4. Techniques for monitoring and controlling projects and how to apply these, including milestone monitoring and Earned Value Analysis
5. Industry specific tools and software for monitoring project performance
6. The importance of establishing an agreed change control process; understand why change occurs and the increasing cost of making changes as a project evolves through the project lifecycle
7. The type of changes that may affect key project criteria, including time, cost, quality, and business case
8. Responsibilities in relation to change control, including project sponsor, project manager and governance sign-off Boards
9. The importance of contingency plans
10. The impact and consequences that changes can have on schedules, resources, and budgets
11. The importance of evaluating and monitoring project benefits and challenges, and how to do this
12. Different ways, formats, and frequencies of reporting to stakeholders

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Monitor and review project progress (ECIPMD2)
- Manage agreed project changes (ECIPMD4)

Work Situation

Organising and facilitating meetings

Goal of work situation: To organise and facilitate meetings to achieve objectives in line with organisational requirements.

Brief outline: This is about organising and facilitating meetings with stakeholders to achieve objectives. This may involve solving problems, making decisions, consulting with people or exchanging information and knowledge relating to a project. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Providing clarity on subject matter, purpose, and objectives of meetings
2. Organising appropriate attendance of meetings
3. Booking meeting facilities ensuring suitable time and space
4. Creating and sharing agendas with attendees
5. Circulating any pre-reading where appropriate
6. Leading meetings including summarising discussions at appropriate times and allocating action points to attendees
7. Taking appropriate records of meetings
8. Following up on any actions within required timescales
9. Providing follow-up or updates to attendees as required

Knowledge and understanding requirements

1. How to establish the purpose and objectives of meetings
2. The importance of confirming meetings are the best way to achieve objectives
3. How to prepare to lead meetings
4. The importance of preparing meeting documentation including notice of meeting, agenda and minutes
5. The period of notice required to enable participants to attend
6. How to identify who needs to participate in meetings including; circulating relevant information in advance, informing attendees of their roles, and the importance of meeting and preparation required
7. The importance of clarifying specific meeting objectives, encouraging all participants to make clear, concise and constructive contributions from their perspectives, and acknowledging and building on the contributions of participants
8. Why it is important to set a fixed time for meetings to begin and end, and allocate time appropriately for each agenda item
9. How to discourage unhelpful comments and digressions, refocus attention on meeting objectives, and manage time flexibly, giving more time to particular agenda items
10. Meeting authority, remit, terms of reference
11. Any formal procedures that apply to meetings
12. Those who are affected by decisions and need to know about them

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Plan and organise your own meetings (CFASAA411)

Work Situation

Planning and scheduling projects

Goal of work situation: To plan project scope, schedule, and resources in line with agreed objectives and organisational requirements.

Brief outline: This is about engaging with all stakeholders to agree project management plans covering project scope, schedule, and resources. This involves identifying milestones, allocating resources and time to activities, and establishing any project review activities. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Defining the scope of projects to reflect stakeholder expectations
2. Developing and agreeing Project Initiation Documents that define and plan projects
3. Developing Project Management Plans (PMP) that define the project activities and work content, events, and work packages
4. Checking PMP to confirm that it meets customer or client remits
5. Identifying project milestones that enable progress to be measured
6. Identifying and obtaining internal project resources in line with the project scope
7. Estimating, specifying, and obtaining external project resources in line with the project scope
8. Allocating responsibility, resource, and time to activities to deliver projects in line with plans
9. Establishing project review activities that support economically effective rescheduling

Knowledge and understanding requirements

1. The project life cycle including initiation, planning, execution, transition, project closure, business as usual
2. How to plan projects and project planning methodologies
3. Who to involve in the development of project management plans, the intended audience and the use of Project Management Plans throughout the project lifecycle
4. How to establish and update a project baseline
5. The importance of interdependencies between project activities and critical paths and how to identify them
6. Project scope including Statement of Work (SOW), Product Breakdown Structure (PBS), Work Breakdown Structure (WBS), Organisational Breakdown Structure (OBS), Responsibility Assignment Matrix (RAM)
7. How to check plans against customer and client remits
8. How to develop schedules using appropriate project management tools and technologies
9. How to estimate resource loading to activities
10. How to reschedule projects, taking account of critical paths, interdependencies, activity slack times and activity costs
11. How to present and communicate project management plans
12. The technology tools used for scheduling and programming

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Produce and agree the project management plan (ECIPMC7)
- Develop a schedule of project activities (ECIPMC1)

Work Situation

Realising project benefits

Goal of work situation: To identify, define, evaluate, plan, track and realise the business benefits of projects, programmes, and change initiatives in line with organisation and regulatory requirements.

Brief outline: This is about ensuring that the benefits intended from project, programme or change initiatives are achieved. It involves identifying intended benefits and reviewing and evaluating project outcomes. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Identifying intended benefits and outlining these in the business case
2. Developing frameworks to monitor and evaluate activities, outputs, capabilities, outcomes, and benefits
3. Gaining approval of monitoring and evaluation plans, using agreed governance arrangements
4. Developing and agreeing controls and processes to measure future benefits when project has transitioned to business as usual
5. Using agreed controls and processes to assess the benefits and disbenefits realised
6. Recording changes in expected benefits using the change control process
7. Completing all necessary documentation required for post-implementation reviews
8. Participating in benefits realisation reviews to confirm whether the anticipated business benefits have been realised
9. Recording lessons learned to provide information to support effectiveness and efficiency of future projects

Knowledge and understanding requirements

1. Who needs to be involved in the benefits realisation process
2. How the intended benefits align with the organisation's strategic vision and operational plan
3. How to develop monitoring and evaluation frameworks
4. The organisational systems used for tracking project benefits
5. How to use benefits maps, chains, or breakdown structures
6. The difference between accountability for deliverables and accountability for benefits delivery
7. How to avoid the risk of double counting benefits and the implications of this
8. The difference between tangible and intangible benefits
9. The exceptions and tolerances in benefits that Project Managers can work within and when approval for a change in benefits should be sought
10. The organisation's project governance and escalation procedures for flagging and approving changes to the expected benefits
11. The purpose of benefits realisation reviews
12. The role of Project Managers in benefits realisation reviews
13. How to capture lessons learned using organisational systems
14. The purpose and value of holding retrospective meetings

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Identify project benefits and disbenefits (ECIPMB1)
- Deliver the benefits for the project (ECIPMD9)

Work Situation

Supporting Procurement

Goal of work situation: To support the procurement process to ensure resources are obtained in line with organisational or regulatory frameworks and requirements.

Brief outline: This involves supporting procurement processes to obtain required resources. This includes identifying the required information and resources, establishing timelines, developing specifications and selecting suppliers. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Identifying required resources in line with scope
2. Gathering required information to assist with 'do or buy' decisions to confirm procurement requirements
3. Establishing procurement timelines to ensure resources are delivered in line with plans
4. Developing specifications for the procurement of resources that are in line with requirements and with organisational procedures
5. Selecting suppliers in line with requirements and using procurement processes

Knowledge and understanding requirements

1. The different stages of the procurement process
2. The type, quality and quantity of resources required to carry out activities, including people, materials, equipment, facilities, finance, and other relevant information
3. The range of options for fulfilling resource requirements
4. Types of specifications including design, engineering, and performance
5. Legislation in relation to procurement
6. The content of specifications including introduction, tender instructions/compliance, background to organisation/department, project requirement, and price
7. Procurement frameworks, including public sector and suppliers
8. Methods of publicising contracts for the invitation to tender
9. Sources of external suppliers and how to identify suitable suppliers
10. How to prepare invitations to tender
11. The processes and criteria for ranking and selection of suppliers and how to apply them
12. How to apply a 'do or buy' decision making process

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Procure external project resources (ECIPMD11)
- Select suppliers through a tendering process (INSML057)

Work Situation

Supporting the management of contracts

Goal of work situation: To support the management of contracts to ensure quality goods and/or services are delivered on time, within budget and in line with organisational requirements.

Brief outline: This involves providing support with the management of contracts. This includes supporting the development of contracts, monitoring the contract performance and tracking progress, and contract closure. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

1. Supporting the development of contractual arrangements in line with organisational policies, procedures, and service level agreements
2. Communicating contract details to wider team to support delivery
3. Monitoring the performance of suppliers against agreed contractual obligations in terms of specified quality, timelines and reliability of goods and services and taking relevant action
4. Supporting own organisation to meet its contractual obligations, including payment to suppliers
5. Tracking progress and compliance of contracts to agree and record any required changes
6. Conducting closure of contracts once goods and services have been delivered

Knowledge and understanding requirements

1. Contractual obligations or service level agreements for own organisation and suppliers, including KPIs, specified quality, timelines, reliability of goods/services and payment
2. The organisation's approach to developing contracts including policies and procedures; roles and responsibilities of stakeholders; service level agreements, deliverables; costs; legal and commercial requirements
3. The importance of liaising with project teams on contract details and how to do this
4. The implications of managing different types of contracts
5. Payment implications including fixed price, lump sum, and reimbursable
6. Different contract management arrangements – how to track progress and compliance including contract costs versus spending; agreement of contract changes; and how to escalate non-compliance
7. Techniques and tools for monitoring and reviewing risks, including escalation to management
8. Contract maintenance procedures and how to apply them
9. Procedures to follow to close contracts and how to apply them
10. Health and safety policies and procedures, including organisational; industry; and well-being

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Review and monitor the financial control of the project (ECIPMD5)
- Monitor project income and expenditure (ECIPMD6)
- Prepare and maintain contracts (INSBA019)

Work Situation:

Understanding the organisation and the environment it operates in

Goal of work situation: To understand how work activities fit into the landscape and context of the organisation and the environment in which it operates so that it can be described and communicated to others.

Brief outline: This is about understanding and linking project deliverables to an organisation's structure, objectives, strategy and culture. It also requires an understanding of the external environment that the organisation operates in. This work situation provides opportunities to develop and evidence meta-skills.

Performance requirements

Note there are no performance requirements as this is a knowledge work situation

Knowledge and understanding requirements

1. The organisation's objectives, strategy, culture and structure and how projects and programmes fit within these
2. How to develop an Organisational Breakdown Structure for projects
3. The environment the organisation works in, its position in the sector, client base, and organisation and sector developments
4. Public policy relating to the sector a project or programme operates in
5. How to undertake a SWOT and PESTLE analysis and interpret the outputs
6. The difference between 'business as usual' and projects
7. The governance arrangements for projects or programmes
8. How projects and programmes are organised and managed
9. How the Project Manager or Portfolio Manager roles fit into the organisation, including responsibilities of the Project Management Office, the project management methodologies, knowledge and tools and the importance of these
10. The purpose and importance of project and programme life cycles
11. The organisational policies and procedures that have an impact on the projects or programmes
12. Different ways, formats and frequency of reporting and presenting management information
13. The impact of emerging developments on project and programme development and implementation
14. Dependencies that have an impact on how projects or programmes are managed

National Occupational Standards

This work situation aligns to the following National Occupational Standards:

- Identify and obtain internal project resources (ECIPMD10)
- Identify and establish procedures and responsibilities for the project (ECIPMC5)
- Deliver the benefits for the project (ECIPMD9)
- Review the project and capture lessons learned (ECIPME3)