

Unit AB1 Develop and agree objectives for projects

Elements

AB1.1 Define aims and initial objectives for the project

AB1.2 Identify and assess factors affecting the achievement of objectives for the project

AB1.3 Develop and agree objectives for the project

Unit Commentary

This Unit is relevant to archaeologists responsible for the development of projects on behalf of clients and the agreement of contracts to undertake the project. This function is performed both by internal project managers developing a project on behalf of their own organisation and by external consultants who are likely to be working for non-archaeological organisations. This unit involves the definition of aims and objectives for projects.

The starting point is to establish the client's aims and objectives for the project. Who is the 'client'? There may be several: direct clients include those who have appointed the consultant/project manager, those who will pay for the work to be carried out, and those who will be accountable for project outcomes. Indirectly, there may be others whose aspirations and expectations must also be taken into account including political or financial sponsors and/or beneficiaries from the project's successful conclusion. These could be referred to as 'stakeholders'; 'clients' and 'stakeholders' therefore will often be a mix between those directly and indirectly interested in the project and those within and external to the project manager's own organisation.

It is possible that the client's aims originate from poorly defined or vague needs. Hence, included in the Unit are the functions of clarifying client and stakeholder aims, assessing factors that influence the achievement of objectives, developing options and final agreement with the clients and stakeholders of objectives to be met.

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AB1.1 Define aims and initial objectives for the project

Performance Required

This will involve:

- a) accurately identifying the **client(s)** and their responsibilities for the project
- b) clearly establishing the scope of the project
- c) accurately interpreting the relevant ideas, **aims and expectations** of the client in enough detail to define the broad objectives
- d) determining that initial **objectives** are practicable and reaching agreement with the client in a manner conducive to their continuing support

Occupational Context

- 1 Clients:**
 - external
 - internal
 - line management
 - key groups interested in project outcomes
- 2 Aims and expectations:**
 - of internal clients
 - of external clients
 - clients' critical success criteria
 - objective; subjective
- 3 Objectives:**
 - primary; secondary
 - short term; long term
 - technical
 - academic
 - commercial
 - financial
 - time
 - performance
 - quality
 - regulatory

Knowledge Requirements

You need to know and understand how to:

- Identify and clarify clients' aims, expectations and objectives
- Negotiate with clients

You need to know about:

- Clients aims and strategic objectives - understanding the influence of these on the project.
- What work would be necessary in order to fulfil the clients' aims, objectives and expectations
- Types of short term and long term objective

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AB1.1 Define aims and initial objectives for the project

Required Skills

You should demonstrate:

- How to determine client's aims, objectives and expectations

Evidence Required

You should provide evidence that you can define aims and initial objectives for the project

The candidate should be questioned, based upon the documentation provided, to explore the following

- clients' responsibilities for the project
- definition of project scope
- aims, ideas and expectations of clients
- initial objectives agreed with clients
- whether clients' aims, objectives and expectations were realistic and accord with professional best practice

Evidence Rules

- The candidate should have been involved in at least 2 substantive projects

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AB1.2 Identify and assess factors affecting the achievement of objectives for the project

Performance Required

This will involve:

- a) identifying significant **factors** potentially relevant to the initial objectives
- b) gathering sufficient information to assess the impact of the identified factors on the initial objectives recording these accurately
- c) identifying and justifying to the client the need for **specialist advice** where it is critical to the assessment process, and obtaining required advice
- d) accurately assessing the impact of identified factors on the initial **objectives** and presenting the analysis clearly and in sufficient detail to enable recommendations for changes to initial objectives to be justified

Occupational Context

1 Factors:

- constraints, threats and opportunities in relation to:
 - health and safety
 - environmental impact
 - location and local conditions;
 - resources
 - time
 - impinging activities
 - confidentiality
 - regulatory context
 - commercial context
 - technical context
 - users
 - community context

2 Specialist advice:

- commercial
- resources
- technical
- regulatory
- legal
- community
- academic

3 Objectives:

- primary; secondary
- short term; long term
- academic
- technical
- commercial
- financial
- time
- performance
- quality
- regulatory

Knowledge Requirements

You need to know and understand how to:

- Assess factors
- Communicate – orally and in writing – to clients the impact of significant factors upon their initial objectives

You need to know about:

- Factors peculiar to or of particular significance to the project context
- Others' experience in carrying out similar activities
- Significance of activities which impinge on the project
- Commercial context of project
- Regulatory context of project
- Sources and types of specialist advice

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AB1.2 Identify and assess factors affecting the achievement of objectives for the project

Required Skills

- N/A

Evidence Required

You should provide evidence that you can identify and assess factors affecting the achievement of objectives for the project

The candidate should be questioned, based upon the documentation provided, to explore the following

- factors identified and prioritised
- information on factors gathered
- input by specialists
- briefing instructions to specialists
- impact of identified factors

Evidence Rules

- The candidate should have been involved in at least 2 substantive projects

AB1 Develop and agree objectives for projects

AB1.3 Develop and agree objectives for the project

Performance Required

This will involve:

- a) verifying that **clients'** objectives are sufficiently clear to develop feasible project objectives
- b) developing project **objectives** which are as close to the clients' objectives as can be justified by consideration of the impact of the identified factors
- c) fully involving clients in the refinement of project objectives to gain their support for decisions
- d) developing and agreeing with clients criteria which are suitable to select preferred project objectives from options
- e) defining project objectives in terms of **measurable outcomes**
- f) agreeing project objectives with clients in a manner conducive to their continuing support

Occupational Context

1 Clients:

- external
- internal
- line management
- key groups interested in project outcomes
- colleagues in different disciplines

2 Objectives:

- primary; secondary
- short term; long term
- academic
- technical
- commercial
- financial
- time
- performance
- quality
- regulatory

3 Measurable outcomes relate to:

- performance
- accuracy
- use of resources
- time
- health and safety
- compliance with regulations
- client satisfaction (internal; external)
- end user satisfaction (fit for purpose)

Knowledge Requirements

You need to know about:

- How project objectives are expressed for internal and external clients
- Means of gaining agreement and support – formal, informal
- Relevant criteria for selecting options and their application
- Targets and performance indicators relevant to the project type and the project organisation

AB1 Develop and agree objectives for projects

AB1.3 Develop and agree objectives for the project

Required Skills

- N/A

Evidence Required

You should provide evidence that you can develop and agree objectives for the project

The candidate should be questioned, based upon the documentation provided, to explore the following

- project objectives and options developed
- criteria developed to select project objectives from options
- application of criteria to select from options
- measurable outcomes related to project objectives
- project objectives agreed with clients

Evidence Rules

- The candidate should have been involved in at least 2 substantive projects