

Unit AB2 Propose and agree project methods

Elements

AB2.1 Identify project requirements

AB2.2 Agree project methods

UNIT COMMENTARY

This Unit deals with the development of a detailed project design from a client's brief, identifying what tasks should be undertaken, how and by whom; ensuring that methods specified are accurate and sufficient for purpose, conforming with relevant regulations and guidance; and bringing these proposals together in a method statement

In order to identify project requirements you need to be clear about the requirements set out in the client's brief and the limits of your responsibilities. You will need to make a judgement about the level of detail required and be able to assess what are the critical aspects of the project. Depending on the purpose that the project is designed to serve and stage at which it takes place, you will need to be aware of the cost and time implications to the project programme and be able to select appropriate and cost effective methods. You will also need to be able to identify sources of expert advice and support to help plan and carry out the project.

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AB2.1 Identify project requirements

Performance Required

This will involve:

- (a) identifying from the project brief what tasks must be carried out, by whom and confirming these with the client
- (b) identifying and prioritising all relevant **factors relating to the project** which will require consideration
- (c) identifying relevant **sources of data** and selecting appropriate **methods** to achieve project objectives
- (d) identifying appropriate project quality assurance and safety requirements

Occupational Context

1 Projects may include:

- desk-based studies
- field investigations of sites and landscapes
- intrusive
- non-intrusive
- artefact studies
- interpretive projects
- educational projects

2 Factors relating to the project:

- Archaeological and cultural factors:

- archaeological context
- cultural context
- historical context
- research frameworks and agendas
- conventions, charters, guidelines

- Regulatory factors:

- planning regulations
- health and safety regulations
- archaeological policy and guidance
- scheduled ancient monument status
- designed landscape status
- conservation area status
- listed building status
- other non-statutory guidelines

3 Sources of data may include:

- site and site context
- archive records, reports, research publications
- site owners / occupiers
- statutory authorities, utilities
- government departments
- consultative bodies

4 Methods:

- documentary
- statistical
- comparative
- experimental
- investigative

Knowledge Requirements

You need to know and understand how to:

Level of investigation

- Establishing the appropriate type and level of investigation

You need to know about:

Methods of investigation

- What appropriate methods of investigation to employ in the context of different projects:
- Relevant physical aspects of sites and their environs (for field projects)
- Relevant archaeological, historical and cultural factors and constraints
- Regulatory factors

Types of quality assurance and safety requirements

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AB2.1 Identify project requirements

Required Skills

You should demonstrate:

- How to communicate with clients – orally and in writing – to ascertain which investigations are needed for each stage of the project
- How to carry out research to discover all relevant information about the site
- Which methods of investigation would be most appropriate for the project at hand
- How to schedule investigations
- How to budget work to be done
- How to communicate with other interested parties to request their co-operation
- That personnel involved in the investigations are suitably qualified
- That all personnel are aware of their legal and contractual obligations
- How to carry out research from documentary sources
- Taking expert advice
- How to Interpret technical data and reports

Evidence Required

You must provide documentary evidence that you have:

- accurately identified what investigations must be carried out and by whom
- agreed with the client a feasible schedule for investigation and estimated agreed associated time and costs

You will produce supporting documentary evidence that, in doing so, you have:

- identified and prioritised all relevant factors which will require investigation
- selected appropriate methods for investigation and data sources
- provided third parties, who will be affected, with clear and accurate information and requested their co-operation
- verified, where investigation is commissioned from others, that investigators are competent

Evidence Rules

- Your evidence must be from the result of work activities carried out by yourself on at least two significant projects

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Performance Required

This will involve:

- a) presenting and agreeing appropriate **methods** with the client
- b) agreeing with the client a schedule that meets the project requirements and estimating associated time and costs
- c) ensuring that the proposed project conforms with all relevant **regulations and guidance**.
- d) obtaining any appropriate and necessary **permissions or approvals** for the proposed project design

Occupational Context

1 Methods:

- documentary
- statistical
- comparative
- experimental
- investigative

2 Regulations and guidance:

- planning regulations
- policy and guidance
- scheduled ancient monument status
- designed landscape status
- conservation area status
- listed building status
- non-statutory guidelines

3 Permissions or approval from:

- client
- site owner and occupiers
- owner of artefacts
- adjoining owners and occupiers
- local / statutory authorities
- professional bodies
- public utilities
- other notifiable authorities

Knowledge Requirements

You need to know and understand how to:

Planning projects

- Specifying, planning and scheduling site investigations in terms of:
- Required investigation outcomes
- Cost
- Timescale

You need to know about:

Relevant regulation and guidance

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Required Skills

You should demonstrate:

- How to obtain permissions and insurance
- How to carry out investigations according to the budget brief and agreed schedule
- How to commission investigations
- That investigations meet the requirements of the brief
- That data are complete, accurate and in an appropriate format
- How to seek expert advice
- How to collate, assess and interpret data
- How to prepare reports and assessments in suitable formats for circulation and discussion with interested parties
- How to accurately reference the report
- Compliance with health and safety regulations

Evidence Required

You must provide documentary evidence that you have:

- presented an investigation report that clearly indicates all relevant factors and any significant interactions between them and which states clearly the authority on which assessments, interpretations and recommendations have been made

You will produce supporting documentary evidence that, in doing so, you have:

- confirmed relevant permissions and insurances
- carried out and commissioned investigation of relevant factors relating to the site
- established that the scope and rigour of investigations meet the requirements of the brief and verified that data are complete, accurate and in a clear format
- sought expert advice on specific issues identified as relevant to the investigation
- assessed and accurately interpreted data from investigations¹ and identified and recorded findings, including opportunities and constraints

Evidence Rules

- Your evidence must be from the result of work activities carried out by yourself on at least two significant projects

¹ This will include investigations carried out both by yourself and those commissioned from others.