
Overview

This standard is for archaeologists who deal directly with clients in securing commissions and have discretion to negotiate and provide professional services covering all types of archaeological commission.

In order to obtain the client's requirements, budget and timetable, you need to establish not only the client's goals, aspirations and practical needs, but also what constraints might apply. You will need to gain sufficient preliminary information about the client, the site and the complexity of the project envisaged to make an initial judgement about whether your own organisation is able to take on the project. And if you do, what sort of project team would need to be assembled; what procurement arrangements would be preferable; and the likely cost and timescale.

In order to advise on the need for and scope of professional services, you will need to understand the limits of your own organisation's capability; the range of other specialists who will need to be involved; the types of service they provide and sufficient about their roles, responsibilities and normal fee arrangements to give the client realistic and accurate advice on the type of project envisaged and be able to weight your fee proposals accordingly. Also, to be able to assess the extent to which the client may involve you in changes and abortive effort. You will also need to understand the processes involved in fee tendering and be able to put together bids which are realistic, but also competitive.

In order to establish and maintain relationships with clients, you will need to build and maintain an atmosphere of trust with clients and their representatives. Your communications with clients must be clear and sensitive to their level of understanding of archaeological processes. You will also need to be able to deal with good news as well as bad in a tactful but honest way.

Performance criteria

Obtain the client's requirements, budget and timetable

You must be able to:

- P1 identify the client's broad goals, expectations and priorities and establish sufficient detail about the client and their needs to make a judgement about your own organisation's ability to provide the services required within the timescale
- P2 identify project purpose, relevant performance standards and requirements of other stakeholders
- P3 identify, apply and communicate relevant technical and ethical standards
- P4 accurately identify relevant cultural, archaeological, conservation and environmental factors and constraints likely to influence service delivery
- P5 accurately identify client preferences, options for and constraints on project financing and procurement
- P6 accurately identify client's and other stakeholders' perceptions of options and constraints on timetable for project development and implementation
- P7 provide constructive advice on alternative courses of action, where requirements cannot realistically be met by own organisation
- P8 summarise and accurately record client requirements for services; agree a basis for further action; and confirm this in writing

Agree fees for professional services

You must be able to:

- P9 explain clearly the options for the professional appointment, the range of services to be provided and recommend and justify the fee basis in the context of the client's project requirements
- P10 provide the client with opportunities to discuss the options for appointment, range of services and the recommended fee basis
- P11 agree with the client the scope of the commission and the method and form of appointment
- P12 accurately calculate, to the level of detail required, a fee quotation incorporating all relevant factors, risks and opportunities
- P13 identify and incorporate in the offer, qualifications necessary to protect your organisation's interests
- P14 ensure that the quotation is complete, accurate, conforms to organisational house style and is presented and supported in a manner which maximises the opportunities for acceptability
- P15 ensure that the quotation is submitted in accordance with client's requirements and recorded for future reference
- P16 negotiate, agree and confirm valid adjustments acceptable to both parties in a manner which maintains goodwill and trust where challenged by the client

Establish and maintain relationships with clients and stakeholders

- P17 communicate with clients and stakeholders in a manner which promotes

- enthusiasm, goodwill and trust, demonstrates a duty of care and honours promises and undertakings
- P18 maintain honest and constructive relationships with the client and stakeholders, ensuring that clients are aware of their own duties and responsibilities
 - P19 inform the client at an appropriate level of detail about activities, progress, results and achievements
 - P20 offer advice and help with sensitivity and encourage the client to ask questions, seek clarification and make comments at appropriate stages
 - P21 provide clear and accurate information about emerging threats and opportunities on a continuing basis
 - P22 present proposals for action clearly, at an appropriate time and with the right level of detail for the degree of change, expenditure and risk involved
 - P23 deal with differences of opinion in a way which minimises offence, and resolve conflicts in ways that maintain respect and minimise delay and disruption

Knowledge and understanding

You need to know and understand:

- K1 how to identify client goals, expectations and priorities
- K2 how to identify the needs and interests of stakeholders
- K3 how to advise the client on options when their requirements and/or expectations are unrealistic
- K4 how and when to recommend other courses of action where the project is beyond your own organisation's capability
- K5 how to access information relevant to preparing an initial project
- K6 how to evaluate an initial project proposal in terms of:
 - K6.1 Timescale
 - K6.2 Physical feasibility and constraints
 - K6.3 Procurement routes
- K7 what information it is important to collect at the initial stage and how to obtain it
- K8 financial feasibility and business risk or the client and for your own organisation
- K9 legal, regulatory and environmental constraints
- K10 relevant technical and ethical standards
- K11 your own organisation's capability
- K12 the selected Form of Appointment and the associated range of services
- K13 different methods for calculating fees
- K14 types of qualification necessary in submitting quotations for fees
- K15 fee profiling
- K16 fee negotiation
- K17 how to use work breakdown methods for estimating resource costs
- K18 sources of cost data for calculating costs
- K19 how to use risk analysis techniques
- K20 cash flow analysis
- K21 how to factor overhead costs
- K22 how to calculate profit
- K23 how to liaise and communicate with clients and stakeholders at the formal, informal and social level and maintain honest and constructive relationships
- K24 how and when to keep clients and stakeholders informed of progress, results and achievements
- K25 how to advise clients and stakeholders of emerging threats and opportunities
- K26 how to resolve conflicts and differences of opinion without losing the client's confidence

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Agree professional services for archaeology

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