ECIPMD11
Procure external project resources

Overview

This standard is about procuring external project resources. Project resources may include; people, materials, equipment, facilities, financial and information resources.

This standard covers identifying the need for external resources, agreeing specifications for resources with stakeholders and producing invitations to tender. It also covers the selection of suppliers and the setting up of contractual agreements.

Project Management National Occupational Standards (PMNOS) are based on the following project management lifecycle:

A   Establish and lead the project team, and work with stakeholders
B   Define and initiate the project
C   Develop the project management plan
D   Deliver the project
E   Close and review the project

This standard is part of area D 'Deliver the project'.

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Performance criteria

You must be able to:

P1   identify the need for external project **resources**

P2   seek advice and guidance on any aspects of the procurement process which need specialist input

P3   develop the contract specification and agree the content with **stakeholders**

P4   appropriately publicise the contract specification and invite tenders/bids

P5   draw up a shortlist of potential suppliers using agreed criteria

P6   select a suitable supplier following approved procedures

P7   establish a contractual agreement with the successful supplier

P8   develop a contract compliance monitoring plan and agree the content with stakeholders

P9   agree protocols and procedures for monitoring contract compliance with the successful supplier

P10   carry out post procurement actions for unsuccessful suppliers

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Knowledge and understanding

You need to know and understand:

K1   the context of the project

K2   relevant legislative, regulatory and organisational requirements

K3   approved policies and procedures for procurement and service level agreements

K4   methods of publicising contracts for the invitation of tenders

K5   sources of advice and guidance on the procurement process

K6   sources of external suppliers/service providers

K7   how to produce a specification for external contracts

K8   how to select external suppliers using agreed criteria

K9   the different types of contractual agreements that may be used

K10   how to monitor and evaluate contract progress and compliance

K11   what steps to take if the contractual requirements are not met

K12   what rewards can be implemented if contract terms and conditions are exceeded by the contractor

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Additional Information

Scope/Range

Resources:

1   People

2   Materials, equipment or facilities

3   Finance

4   Data and information

Stakeholders:

1   Sponsors

2   Clients or customers

3   Relevant groups/individuals interested in the project

4   Relevant groups/individuals affected by the project

5   Relevant groups/individuals who might affect the project

Glossary

Context of the project

This phrase appears in the knowledge and understanding of the National Occupational Standards (NOS) and relates to the wider context of the project that the individual will need to know about, such as the project environment, the relationship to a wider programme of work and how the project fits with organisational strategies.

The sector in which the project manager works (e.g. software development, construction, manufacturing or process industries) will have its own specific context and this phrase is intended to convey this meaning.

Life cycle

A life cycle defines the inter-related phases of a project and provides a structure for governing the progression of work.

Procurement

Procurement is the process by which products and services are acquired from an external provider for incorporation into the project.

Project

A unique, transient endeavour undertaken to achieve planned objectives.

Resources

Resources are all those items required to undertake a project and may include people, finance, materials and information.

Stakeholders

Project stakeholders may be internal or external to the organisation and include sponsors, clients, customers and all relevant groups/individuals with a relation to the project.

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