
Overview

This standard is about planning and setting up substantial, complex projects which are critical to the strategic objectives of your organisation. Project sponsors may be internal or external to your organisation.

There are three elements

1 Agree the project's scope and definition

This includes clarifying the sponsor's project goals, benefits, constraints, quality and success criteria. You need to establish what links exist with the sponsor's strategic and operational objectives and identify the key stakeholders' interests in the project. You must be aware of any contingencies and risks associated with the project. You must assess the project's feasibility and negotiate any necessary amendments to the scope and definition.

2 Develop plans to achieve the project's goals

This includes involving relevant people in developing plans which are consistent with the project's scope and definition. You must ensure that the plans are manageable, measurable and achievable. You must specify the project's schedule, links and dependencies, handover procedures, monitoring and evaluation methods. You must produce estimates and costings for the human and physical resources which are realistic. You must negotiate and agree your plans with the sponsor.

3 Establish the project's resources and control methods

This includes ensuring that there are suitable team members, with roles and allocated tasks. You must ensure there are clear lines of responsibility and accountability, and that reporting, control and communication methods are in place. You must also provide opportunities for team development. You must establish methods of obtaining the necessary physical resources and managing physical and financial resources efficiently and effectively.

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Agree project plan to meet specified objectives

Performance criteria

Agree the project's scope and definition

You must be able to:

- P1 clarify the project's scope and definition to the level of detail needed to plan the project
- P2 identify the main links between the project's scope and definition and the sponsor's strategic and operational objectives
- P3 identify and reconcile key stakeholders' interests in the project
- P4 identify the main contingencies which may occur during the running of the project and assess their potential impact
- P5 identify, assess and prioritise the main risks associated with the project
- P6 assess the project's feasibility and negotiate any necessary amendments with the sponsor in a way which ensures the goals can be achieved
- P7 establish your level of authority and accountability for project activities, resources and decisions
- P8 confirm all aspects of the project's scope and definition with the sponsor

Develop plans to achieve the project's goals

You must be able to:

- P9 involve relevant people in the development of the project plans and accurately record all aspects of the planning process
- P10 develop strategy and plans for the project which are consistent with the agreed scope, definition and known constraints
- P11 break the project work down into tasks which are manageable, measurable, and achievable
- P12 identify links, dependencies, schedules, evaluation methods, deliverables and handover procedures which support achievement of the project goals
- P13 identify measures to deal with identified contingencies and risks
- P14 estimate and cost the human and physical resources required to carry out the project's tasks
- P15 base the plans on previous experience and the good practice of others
- P16 check, negotiate and agree all key aspects of the project plans with the sponsor and obtain authorisation to proceed

Establish the project's resources and control methods

You must be able to:

- P17 select team members who are able to make an effective contribution to the project's objectives
- P18 assign roles and tasks to team members ensuring they are realistic and equitable
- P19 define team members' lines of responsibility and accountability taking account of their other responsibilities
- P20 agree meeting schedules, reporting, control and communication methods which are consistent with the project plans

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- P21 plan and schedule effective opportunities for team development
 - P22 use methods of obtaining and managing the necessary resources which are consistent with legal and organisational requirements

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Knowledge and understanding

You need to know and understand:

- K1 risk identification and assessment in project planning and how to prioritise risk
- K2 the importance of clarifying and agreeing the project's scope and definition and how to do this with a sponsor
- K3 the importance of maintaining effective working relationships with sponsors and how to do so
- K4 the importance of establishing your own level of authority in the project
- K5 how to re-negotiate project definitions with sponsors
- K6 how projects support organisations' wider strategic and operational objectives
- K7 the organisational and legal requirements which are relevant to managing resources and finance
- K8 the importance of systematic and thorough planning to the success of projects
- K9 the level of detail needed to start systematic project planning
- K10 the types of constraints which usually exist in projects
- K11 the importance of making an initial assessment of the feasibility of projects and how to do so
- K12 the importance of planning for contingencies and how to do so
- K13 the principles underpinning effective project planning and models of project management
- K14 how to break the work down into manageable, achievable and measurable tasks
- K15 how to estimate and cost the human and physical resources needed for projects
- K16 the importance of identifying schedule, links, dependencies, monitoring and evaluation methods and handover procedures
- K17 how computer-based project planning approaches may be used
- K18 the importance of obtaining authorisation before proceeding
- K19 how to allocate project roles and tasks equitably and realistically
- K20 the importance of having clear lines of responsibility and accountability within the project and how to establish these, especially where line management responsibility is shared
- K21 the importance and purpose of control methods and how to select methods appropriate to different types of projects
- K22 how to identify and specify the competence, skills and knowledge which project team members need
- K23 how to obtain the people you require to staff projects
- K24 the importance of tight financial and resource controls
- K25 the importance of team development and methods to achieve this

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Additional Information

Glossary

Constraints: Aspects of the project or the environment which limit how the project will achieve its goals; the most significant ones will be time, finance and other resources, available techniques, legislation and regulatory requirements and the sponsoring organisation's policies and objectives

Project: A unique set of co-ordinated activities, with definite starting and finishing points, undertaken by an individual or organisation to meet specific objectives within defined schedule, cost and performance parameters

Relevant people: Team members, colleagues working at the same level as yourself, higher level managers or sponsors, specialists

Resources: The people, time, equipment, materials, services, energy and premises which you have at your disposal

Stakeholders: People or groups of people who have a vested interest in the success of the project and the environment in which the project takes place

Team members: People who work with you as part of a functional or project team; team members may report to you either as their line manager or as the manager in charge of a specific project or activity on which they are working

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