

## **COSTPCBCB12.1-B12.2-B21.1-B21.2**

### **Prepare project briefs and plans in planning and conservation**



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#### **Overview**

In this unit you will need to advise project stakeholders about current regulatory and technological requirements and innovations to enable them to make informed decisions. You will also need to summarise and present the project requirements and stakeholder's preferences. You will need to investigate and assess the sustainability of development proposals in economic, social and environmental terms. In planning a project might include, for example, environmental or landscaping works, or improvements to a conservation area. You will also need to prepare and present proposals for a project and development brief. You will need to analyse the requirements of the brief and develop a project plan that meets stakeholder requirements.

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### Performance criteria

#### Investigate and evaluate sustainable development requirements

- You must be able to:*
- P1 identify **goals and priorities** for potential development, both currently and in the future
  - P2 **investigate** whether there is a justifiable need to undertake development and consider **alternatives**
  - P3 **investigate** and identify the design, function and performance requirements of the potential project
  - P4 **investigate economic factors and resources, environmental and ecological factors**, and **social views** that affect the future **asset value and sustainability** of potential development
  - P5 evaluate the best balance between the potential **asset value and sustainability** and project design, function, performance and the return on investment
  - P6 decide whether and how to implement potential sustainable development projects so as to achieve key requirements

#### Identify, assess and agree project requirements and stakeholder preferences

- You must be able to:*
- P7 clarify the **project stakeholders'** understanding of project processes and the roles of those who need to be involved
  - P8 identify and negotiate **agreement** with **project stakeholders** on what their **goals and priorities** are both now and for the future
  - P9 identify the function and performance requirements for the project
  - P10 **clarify the project stakeholders' circumstances and requirements**, the options available and the **constraints and risks** which might apply to the project
  - P11 advise **project stakeholders** about current regulatory and technological requirements and innovations to enable them to make informed decisions
  - P12 summarise and **present** the project requirements and **stakeholders** preferences
  - P13 challenge project requirements and **stakeholders** preferences which do not appear to be realistic, decide valid options and **agree** them in writing

#### Prepare and present proposal for a project brief

- You must be able to:*
- P14 identify and agree the **stakeholders'** requirements, opinions and aspirations and prepare a framework for a proposed project
  - P15 check any relevant investigations which have already been made, identify information which is not valid, and obtain additional valid information which is needed

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- P16 **select data** which is relevant and valid, **analyse** it and qualify its status
- P17 estimate and confirm the cost and timescale of the project
- P18 prepare a draft brief clearly, accurately, unambiguously and within the time agreed, and present the brief to **stakeholders** in the most effective way
- P19 explain and discuss any significant constraints, opportunities and areas of uncertainty
- P20 modify the draft to reflect the discussion and relevant points which have been raised
- P21 negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project
- P22 discuss the ways in which the brief can be worded so that it can be modified in the future, explain the implications of doing so, and keep an accurate record of any decisions

#### Prepare a project plan

*You must be able to:*

- P23 check and confirm with **stakeholders** that the **requirements** in the brief are accurate and clearly state the project development requirements
- P24 analyse the **requirements** of the brief and check and clarify initial assumptions about the **project plan** with **stakeholders**
- P25 develop a realistic outline **project plan** which takes account of identified **constraints**
- P26 discuss the outline **project plan** with **stakeholders** and agree any necessary modifications to the brief, outline **project plan**, or **constraints**
- P27 prepare, **present** and agree a **project plan** which meets the **requirements** of the brief and the **expectations** of **stakeholders**

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### Knowledge and understanding

#### Investigate and evaluate sustainable development requirements

*You need to know and understand:*

- K1 what to identify as **goals and priorities** for potential development (understanding)
- K2 how and why to **investigate** whether there is a justifiable need to undertake development and consider alternatives (analysis)
- K3 what to identify as the design, function and performance requirements of the potential project (understanding)
- K4 how and why to **investigate** the design, function, and performance requirements of the potential project (analysis)
- K5 how and why to **investigate economic factors and resources, environmental and ecological factors, and social views** that affect the future **asset value and sustainability** of potential development (analysis)
- K6 how and why to evaluate the best balance between the potential **asset value and sustainability** and project design, function, performance and the return on the investment (evaluation)
- K7 how and why to decide whether and how to implement potential sustainable developments so as to achieve key requirements (evaluation)

#### Identify, assess and agree project requirements and stakeholder preferences

*You need to know and understand:*

- K8 how to clarify the **project stakeholders'** understanding of project processes and the roles of those who need to be involved (application)
- K9 what to identify to be the **project stakeholders' goals and priorities** both now and in the future (understanding)
- K10 how and why to negotiate **agreement** with the **project stakeholders** on what their **goals and priorities** are both now and in the future (evaluation)
- K11 what to identify as the function and performance requirements for the project (understanding)
- K12 how to **clarify the project stakeholders' circumstances and requirements**, the options available and the **constraints and risks** which might apply to the project (application)
- K13 how and why to advise **project stakeholders** about current regulatory and technological requirements and innovations to enable them to make informed decisions (synthesis)
- K14 how and why to challenge project requirements and **stakeholders' preferences** (analysis)
- K15 how and why to advise **project stakeholders** about current regulatory and technological requirements and innovations to enable them to make informed decisions (synthesis)

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- K16 how and why to decide which options are valid and **agree** them in writing (evaluation)
- K17 how to summarise the project requirements and **stakeholders'** preferences (application)
- K18 how to **present** the project requirements and **stakeholders'** preferences (application)

#### Prepare and present proposal for a project brief

*You need to know and understand:*

- K19 what to identify as **stakeholders'** requirements opinions and aspirations (understanding)
- K20 how to agree the **stakeholders'** requirements, opinions and aspirations (evaluation)
- K21 how to explain and discuss any significant constraints, opportunities and areas of uncertainty (application)
- K22 how to modify the draft to reflect the discussion and relevant points which have been raised (application)
- K23 how to estimate and confirm the cost and timescale of the project (analysis)
- K24 how to prepare a framework for a proposed project (synthesis)
- K25 how to prepare a draft brief clearly, accurately, unambiguously and within the time agreed (synthesis)
- K26 how to negotiate a clear and mutually acceptable agreement on the brief which is in sufficient detail to allow work to start on the next stage of the project (synthesis)
- K27 how to identify information which is not valid(understanding)
- K28 how to obtain additional information which is needed (application)
- K29 how to check any relevant investigations which have already been made (application)
- K30 how to discuss the ways in which the brief can be worded so that it can be modified in the future explain the implications of modifying the brief and keep an accurate record of any decisions (application)
- K31 how to **select data** which is relevant and valid (evaluation)
- K32 how to **analyse** data and quality its status (analysis)
- K33 how to present the brief to **stakeholders** (application)

#### Prepare a project plan

*You need to know and understand:*

- K34 how to check and confirm with **stakeholders** that the **requirements** in the brief are accurate and clearly stated (application)
- K35 how and why to analyse the **requirements** of the brief (analysis)
- K36 how to check and clarify the initial assumptions about the **project plan** in the draft brief (application)
- K37 how to discuss the **project plan** with **stakeholders** (application)
- K38 how and why to develop a realistic outline **project plan** (synthesis)

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- K39      how and why to agree any necessary modifications to the brief, outline **project plan**, or **constraints** (evaluation)
- K40      how and why to prepare and **present a project plan** which meets the **requirements** of the brief and the **expectations of stakeholders** (synthesis)
- K41      how and why to agree a **project plan** which meets the requirements of the brief and the **expectations of stakeholders** (evaluation)

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### Scope/Range

### Investigate and evaluate sustainable development requirements

- 1 Goals and priorities:**
  - 1.1 quantity
  - 1.2 quality (including design]
  - 1.3 cost (including whole life costs)
  - 1.4 time
  - 1.5 development
  - 1.6 improvement
  - 1.7 use
  - 1.8 maintenance
  - 1.9 low carbon design
  - 1.10 environmental impact and sustainability
  - 1.11 security
  - 1.12 health and safety
  - 1.13 logistics
- 2 Investigate:**
  - 2.1 use of benchmarking tools
  - 2.2 research
  - 2.3 consultancy advice
  - 2.4 regulatory advice
  - 2.5 insurance risk
- 3 Alternatives:**
  - 3.1 new build
  - 3.2 adaptation
  - 3.3 alteration
  - 3.4 refurbishment/upgrading
  - 3.5 conservation
  - 3.6 demolition/decommissioning
  - 3.7 relocation
  - 3.8 salvage
- 4 Economic factors and resources:**
  - 4.1 finance and funding
  - 4.2 fiscal policy (including carbon tax/incentives)
  - 4.3 water demand/supply/use minimisation
  - 4.4 payback/return on investment
  - 4.5 carbon trading schemes/carbon reduction credits
  - 4.6 climate change levy agreements
  - 4.7 workforce (skills)
  - 4.8 raw materials
  - 4.9 manufactured systems and component/modular systems

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- 4.10 energy use/demand minimisation
- 4.11 water demand/supply/use minimisation
- 4.12 land use
- 4.13 resource efficient low carbon urban design
- 4.14 market demands and social factors

### **5 Environmental and ecological factors:**

- 5.1 natural resources
- 5.2 emissions
- 5.3 effluent
- 5.4 waste and recycling
- 5.5 access to environmentally sensitive areas
- 5.6 effects of climate change
- 5.7 carbon use minimisation
- 5.8 water use
- 5.9 biodiversity
- 5.10 renewable energy technology
- 5.11 land use/contamination
- 5.12 protect archaeological and historically valuable resources
- 5.13 transport impact minimisation

### **6 Social views:**

- 6.1 client
- 6.2 funders/investors
- 6.3 workforce
- 6.4 suppliers
- 6.5 users
- 6.6 community (including public/private space)

### **7 Asset value and sustainability:**

- 7.1 location in relation to a stable economy and community
- 7.2 saleable revenue
- 7.3 minimising running costs (environmental and economic)
- 7.4 minimising maintenance
- 7.5 location in relation to flooding/ground conditions
- 7.6 energy use/demand minimisation
- 7.7 environmental exposure

### **Identify, assess and agree project requirements and stakeholder preferences**

### **8 Project Stakeholders:**

- 8.1 the client
- 8.2 the clients financial advisers
- 8.3 design consultants



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- 8.4 potential contractors
- 8.5 potential subcontractors and suppliers
- 8.6 potential investors
- 8.7 funding agencies
- 8.8 independent advisers
- 8.9 user groups
- 8.10 community groups
- 8.11 statutory and other consultees
- 8.12 statutory bodies
- 9 Agreement:**
  - 9.1 direct with a client
  - 9.2 by negotiation and agreement with partnering team
  - 9.3 facilitation
- 10 Goals and priorities:**
  - 10.1 quantity
  - 10.2 design quality
  - 10.3 conservation criteria
  - 10.4 cost
  - 10.5 time
  - 10.6 development
  - 10.7 improvement
  - 10.8 use/adaptability
  - 10.9 whole life costs
  - 10.10 health, safety and welfare
  - 10.11 sustainability
  - 10.12 economic benefits
  - 10.13 environmental benefits
  - 10.14 community benefits
  - 10.15 security
  - 10.16 market demands
  - 10.17 changing circumstances
- 11 Clarify the project stakeholders circumstances and requirements by:**
  - 11.1 reference to standard documentation
  - 11.2 checklists
  - 11.3 client consultation
  - 11.4 questionnaires
  - 11.5 comparative field research
  - 11.6 market research
  - 11.7 identifying options and alternatives
  - 11.8 use of benchmarking tool
- 12 Constraints and risks:**

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- 12.1 existing assets
- 12.2 time
- 12.3 cost
- 12.4 quality
- 12.5 health and safety
- 12.6 the environment
- 12.7 client requirements
- 12.8 regulatory requirements and guidance

#### **13 Present:**

- 13.1 orally
- 13.2 in writing
- 13.3 graphically
- 13.4 electronically

#### **Prepare and present proposal for a project brief**

#### **14 Stakeholders:**

- 14.1 internal to the organisation
- 14.2 external to the organisation

#### **15 Select - data:**

- 15.1 critical design parameters
- 15.2 the scale and sensitivity of the project
- 15.3 validity of data in any subsequent process of evaluation or appeal

#### **16 Analyse:**

- 16.1 comparison with similar projects
- 16.2 standard checklists
- 16.3 reference to relevant comparative research
- 16.4 benchmarking tools

#### **Prepare a project plan**

#### **17 Stakeholders:**

- 17.1 the client
- 17.2 the client's financial advisers
- 17.3 design consultants
- 17.4 potential contractors
- 17.5 potential subcontractors and suppliers
- 17.6 potential investors
- 17.7 funding agencies
- 17.8 independent client adviser
- 17.9 user groups

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- 18 Requirements:**
  - 18.1 client
  - 18.2 user
  - 18.3 ergonomic
  - 18.4 community
  - 18.5 procurement
  - 18.6 physical
  - 18.7 resource requirements
  - 18.8 conservation
  - 18.9 construction
  - 18.10 regulatory
  - 18.11 health, safety and welfare
  - 18.12 environmental
  - 18.13 operational
  - 18.14 maintenance requirements
  - 18.15 cost requirements
  - 18.16 risk and value
- 19 Project plan:**
  - 19.1 timetable
  - 19.2 phasing
  - 19.3 integration of data
  - 19.4 interaction between consultants
  - 19.5 key project stages
  - 19.6 interaction with approval stages
  - 19.7 interaction with work programme
- 20 Constraints:**
  - 20.1 work content
  - 20.2 time duration/sequencing
  - 20.3 resources available
  - 20.4 contingencies
  - 20.5 budget
  - 20.6 site
  - 20.7 risk
- 21 Present:**
  - 21.1 orally
  - 21.2 in writing
  - 21.3 graphically
  - 21.4 electronically
- 22 Expectations:**
  - 22.1 quality
  - 22.2 standards
  - 22.3 consultation

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- 22.4 timetable
- 22.5 phasing of project stages
- 22.6 best value

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