



COMPASS Competency List

The Competence Management System
for Project Professionals.

Version 1.1

transforming performance
through learning

QA

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INTRODUCTION

This document contains a listing of the competencies used in QA's COMPASS assessment tool.

It is the full listing of all the standard competencies that are contained within the APM Competence Framework, and shows the description of the competency and the indicators for that competency.

This document can be used to gain an insight into the requirements for each competency as a precursor to completing the COMPASS assessment online at <https://compass.qa.com> or for use as a reference when reviewing the final report that is generated when you have completed a COMPASS assessment.

SCORING

SCORE	KNOWLEDGE	EXPERIENCE
0	No Knowledge	No Experience
1	Has an awareness of the competence element	Has participated in a single project which involved the competence element
2	Knows about the competence element	Has participated in a number of projects which have involved the competence element
3	Can describe the competence element	Has practiced the competence element with others in a number of projects
4	Has an understanding of how the competence element could be practiced within a single project	Has independently practiced the competence element in a number of projects
5	Has an understanding of how the competence element could be practiced within a number of projects and can evaluate the value to the projects	Has managed others in practicing the competence in a number of projects
6	Has a good understanding of how the competence element could be practiced within a complex project and can evaluate and adapt as required	Has managed others in practicing the competence in a complex project
7	Has a detailed understanding of how the competence element is practiced within complex projects and can critically evaluate and optimise as required	Has managed others practicing the competence element in a number of complex projects
8	Has a detailed understanding of how the competence element is practiced within complex projects and can critically evaluate and develop further as required	Has managed others practicing the competence element in many complex projects
9	Has a deep knowledge of how the competence element is practiced within very complex projects and educate others	Has guided and facilitated others in practicing the competence element in very complex projects
10	Has a deep knowledge of all aspects of the competence element in very complex projects and is a recognised industry expert (written papers and presentations)	Has guided and facilitated others in all aspects of the competence element in very complex projects and is a recognised industry expert

TECHNICAL COMPETENCE DOMAIN

TC01 CONCEPT (TC01)

Concept is the first phase in the project life cycle. During this phase the need, opportunity or problem is confirmed, the overall feasibility of the project is considered and a preferred solution identified. The business case for the project will be produced in this phase.

Gathers, documents and gets agreement on project requirements with key stakeholders.

Validates and/or develops a business case and project strategies, and place them under change control.

Defines project objectives, appraises the project (including financial appraisal), carries out a feasibility study and establishes an outline project plan.

Identifies, assesses, documents and communicates the potential impact of high-level risks.

Validates requirements at key points during the concept phase.

Assesses compliance with project objectives and requirements and seeks authorisation for the project.

Sets up project review process and associated schedule.

Gains approval either to progress to definition phase, refine concept phase or cancel project.

TC02 PROJECT SUCCESS AND BENEFITS MANAGEMENT (TC02)

Project success is the satisfaction of stakeholder needs and is measured by the success criteria as identified and agreed at the start of the project. Benefits management is the identification of the benefits at an organisational level and the monitoring and realisation of those benefits.

Analyses and understands the project and its context within the proposed business change and how these can enable the expected benefits (indirect, direct, financial and non-financial).

Agrees success criteria for the project with the sponsor, ensuring they are measurable.

Identifies critical success factors for the project with stakeholders.

Agrees KPIs ensuring these are quantitative by using traditional time, cost and quality techniques.

Understands the relationship between the timing of deliverables and the realisation of benefits.

Discusses and agrees the project success criteria and benefits realisation responsibilities with all relevant stakeholders as part of the project management contract with the customer.

Executes and controls PM plans and changes, and reports on project performance.

Ensures that the impacts of any deviations from plan are considered against the business case and the benefits realisation plan, and are escalated to the responsible stakeholders.

Collects results and prepares project performance reports against the agreed KPIs and anticipated benefits, and communicates to relevant stakeholders.

Ensures that benchmark data is captured against which benefit realisation can be measured.

TC03 STAKEHOLDER MANAGEMENT (TC03)

Stakeholder management is the systematic identification, analysis and planning of actions to communicate with, negotiate with and influence stakeholders. Stakeholders are all those who have an interest or role in the project or are impacted by the project.

Identifies and prioritises stakeholder interests.

Analyses their interests, requirements and level of influence.

Develops a strategy/plan to manage and communicates effectively with all stakeholders. Include stakeholder interests and expectations in the requirements, objectives, scope, deliverables, time schedule and costs of the project plan.

Implements and monitors the effectiveness of the stakeholder management plan.

Communicates to stakeholders which of their requirements will be fulfilled or not fulfilled by the project.

Ensures the threats and opportunities represented by stakeholders are captured and proactively managed as risks.

Executes, communicates and manages changes in the stakeholder management plan throughout the life cycle.

Gains the commitment of all stakeholders, including the most challenging.

TC04 REQUIREMENTS MANAGEMENT (TC04)

Requirements management is the process of capturing, analysing and testing the documented statement of stakeholder and user wants and needs. Requirements are a statement of the need that a project has to satisfy, and should be comprehensive, clear, well structured, traceable and testable.

Gathers, documents and gets agreement on project requirements and related acceptance criteria.

Analyses and prioritises requirements, taking into consideration business benefits and priorities.

Evaluates prioritised requirements to ensure they still meet the project objectives and will deliver the required benefits.

Ensures documented requirements are subject to the project configuration management processes.

Establishes a common understanding of the requirements across the project team and all stakeholders.

TC05 PROJECT RISK MANAGEMENT (TC05)

Project risk management is a structured process that allows individual risk events and overall project risk to be understood and managed proactively, optimising project success by minimising threats and maximising opportunities.

Identifies and assesses risks (threats and opportunities) (using qualitative and quantitative techniques), including any assumptions and prepares a risk log.

Develops a risk (threat and opportunity) response plan, assigns ownership, and has it approved by the relevant body and communicated.

Identifies and undertakes response actions and formulates contingency plans as appropriate.

Assesses the probability of achieving time, cost and quality objectives throughout the project.

Continuously identifies new risks, reassess risks, plans responses, modifies the project plan and updates the risk log.

Facilitates risk workshops.

TC06 ESTIMATING (TC06)

Estimating uses a range of tools and techniques to produce estimates. An estimate approximates project time and cost targets and is refined throughout the project life cycle.

Is aware of and understands the degrees of uncertainty that apply to estimates as they are developed throughout the project life cycle. Uses this knowledge to identify assumptions and risks to develop contingency proposals for the project.

Depending on the type and needs of the project, ensures one or more of the three main estimating techniques (bottom-up, comparative and parametric), are used to prepare estimates.

Ensures a suitable number of relevant experts are used to prepare estimates and that the resulting ranges of estimates are used to prepare an overall estimate, together with optimistic and pessimistic targets for each activity.

When using the bottom-up technique, develops product breakdown / work breakdown structures to identify the deliverables (products) and associated development activities needed.

Ensures, whenever possible, that comparative techniques are used e.g. estimates are based on previous experience and usage statistics.

Uses the parametric technique where bottom-up is not feasible and /or comparative data is not available.

Throughout the project ensures that estimates are continually reviewed and revised as and when new information becomes available and more is known about the project.

TC07 BUSINESS CASE (TC07)

The business case provides justification for undertaking a project, in terms of evaluating the benefit, cost and risk of alternative options and rationale for the preferred solution. Its purpose is to obtain management commitment and approval for investment in the project. The business case is owned by the sponsor.

Understands the content and is prepared to write a business case on behalf of the sponsor according to the agreed standards and accounting norms.

Is aware of the internal (i.e. project changes) and external (legislative, market forces) factors that could impact the business case.

Articulates the balance between the benefits sought and the costs and risks of delivering these benefits for each of the options identified. K Ensures the project team are made aware of the business case and the potential impact to the business case arising from any changes to the programme and/or associated project plans.

Throughout the project and at closure, evaluates against the business case to ensure the continued viability of the project; report and escalate any variations to appropriate management levels for decisions.

TC08 MARKETING AND SALES (TC08)

Marketing involves anticipating the demands of users and identifying and satisfying their needs by providing the right project at the right time, cost and quality. Sales is a marketing technique used to promote a project. Marketing and sales needs to be undertaken internally and possibly externally to an organisation.

Develops marketing and sales strategy for the project.

Ensures external and internal environment is understood in terms of project context in effective marketing strategy. Is aware of various selling techniques to achieve buy-in from stakeholders, the project team and users for the project's approach.

Demonstrates appropriate negotiation and influencing skills in marketing and sales.

Investigates and analyses customer dynamics and uses research to inform marketing plans.

Is aware of the impact of marketing and sales in assisting and securing appropriate resources.

Is aware of the need to draw on marketing expertise available within the project or organisation or externally for effective marketing and sales.

Ensures conformance to any copyright, Intellectual Property Rights or any other legal framework that applies to the project deliverables.

Monitor and evaluate marketing and sales activities.

TC09 PROJECT REVIEWS (TC09)

Reviews take place throughout the project life cycle to check the likely or actual achievement of the objectives specified in the project management plan (PMP) and the benefits detailed in the business case. Additional reviews will take place following handover and closeout to ensure that the benefits are being realised by the organisation.

Establishes an effective project review system to be used during and after the project is complete (post-project review).

Schedules project evaluation reviews at key milestones during the project.

During each evaluation: Evaluates the project management processes used, review the likely technical success of the project, reviews the likely commercial success of the project (e.g. Does it still meet the business case?), validates overall progress to time, cost and quality, considers stakeholder relationships and perceptions, develops and applies corrective actions.

Reports project status and performance to interested parties and agrees resulting actions.

At post-project review, prepare a lessons-learned report and apply to future projects.

TC10 DEFINITION (TC10)

Definition is the second phase of the project life cycle. During this phase the preferred solution is further evaluated and optimised. Often an iterative process, definition can affect requirements and the project's scope, time, cost and quality objectives. As part of this phase the project management plan (PMP) is produced and the resources required during the implementation phase will be identified.

Considers alternative designs, using modelling and what-if techniques to meet the preferred solution.

Agrees a design and the preferred solution with the sponsor and stakeholders, ensuring that they can meet the conditions (especially the supply of resources) necessitated by the solution

Prepares a detailed PMP, including, for example: Risk management plan, quality plan, communication plan, health & safety plan (as required), benefits management plan (or the projects contribution to it).

Revalidates the estimates based on the design and risk mitigation.

Communicates and updates the business with any changes from the concept phase.

Finalises and agrees the PMP with the sponsor and stakeholders

Gains approval from the business to move the project to the implementation phase, refine the definition phase or cancel the project.

TC11 SCOPE MANAGEMENT (TC11)

Scope management is the process by which the deliverables and work to produce them are identified and defined. Identification and of the scope must describe what the project will include and what it will not include, i.e. what is in and out of scope.

Identifies and defines interested parties' requirements and objectives.

Agrees appropriate deliverables with relevant stakeholders using product break-down structure and work break-down structure.

Documents and agrees the project scope, and places it under configuration control.

Updates project scope document as changes are agreed via the change control process.

TC12 MODELLING AND TESTING (TC12)

Modelling and testing are used to provide a representation and assurance of whether the project objectives can be achieved. Modelling is the process of creating and using a device that duplicates the physical or operational aspects of a deliverable. Testing is the process of determining how aspects of a deliverable perform when subjected to specified conditions.

- Identifies project deliverables that require prototyping, modelling and/or testing.

- Develops an appropriate testing strategy and schedule, agrees them with the sponsor and stakeholders, and ensures incorporation in project schedule.

- Ensures that project plans take account of areas of uncertainty, identifying responsibilities and allowing adequate budget and time for resolution.

- Ensures that the design decisions taken at one stage are based on information discovered in earlier stages.

- Ensures that a robust and logical approach is adopted and applied in generating and managing technical, cost and schedule risk associated with modelling and testing.

- Ensures that modelling and testing are an integral part of quality assurance and quality control.

TC13 METHODS AND PROCEDURES (TC13)

Methods and procedures detail the standard practices to be used for managing projects throughout a life cycle. Methods provide a consistent framework within which project management is performed. Procedures cover individual aspects of project management practice and form an integral part of a method.

- Understands the organisation's project management methods, processes and supporting systems, including appropriate delivery life cycles available for use by the project.

- Complements the organisation's methods and procedures through the use of recognised project management techniques, tools and experience and scales these appropriately to the complexity and risk requirements of the project.

- Ensures the methods and procedures adopted integrate into the organisation's reporting structure and schedule.

- Ensure all members of the project team understand the methods and procedures to be employed, using training and/or coaching as necessary.

- Ensures improvements developed on the project are communicated and offered as general improvements to the organisation's methods and procedures.

TC14 PROJECT QUALITY MANAGEMENT (TC14)

Project quality management is the discipline that is applied to ensure that both the outputs of the project and the processes by which the outputs are delivered meet the required needs of stakeholders. Quality is broadly defined as fitness for purpose or more narrowly as the degree of conformance of the outputs and processes.

- Discusses and agrees the quality expectations and quality criteria with the stakeholders.

- Develops a quality approach for the project, including key activities and the application of required quality systems.

- Develops the project quality plan taking into consideration the customer's quality assurance and quality control procedures as appropriate, wherever possible including quantitative criteria against which deliverables can be measured. Agrees the quality plan with the customer.

- Executes the project quality plan, carrying out quality assurance and control, and maintains a quality log containing all assurance activities and results.

- Recommends and applies continuous improvements and preventative and corrective actions, and reports on impact on quality.

TC15 SCHEDULING (TC15)

Scheduling is the process used to determine the overall project duration and when activities and events are planned to happen. This includes identification of activities and their logical dependencies, and estimation of activity durations, taking into account requirements and availability of resources.

- Defines and sequences the activities and/or work packages taking into account any dependencies.

- Applies estimates of effort and duration considering resource constraints.

- Identifies major phases, milestones and appropriate review points, and schedules the project to determine the critical path as appropriate. Considers any risks, updating the risk log as appropriate.

- Compares target, planned and actual dates, and takes corrective actions or updates forecast as necessary.

- Regularly updates the schedule with actuals and estimates to complete and reschedule to determine whether target date and costs remain viable, and checks for any changes to the critical path.

- Raises scheduling issues and escalates for sponsor decision.

- Maintains the schedule with respect to changes.

TC16 RESOURCE MANAGEMENT (TC16)

Resource management identifies and assigns resources to activities so that the project is undertaken using appropriate levels of resources and within an acceptable duration. Resource allocation, smoothing, levelling and scheduling are techniques used to determine and manage appropriate levels of resources.

Identifies what resources are required, including the specific project management effort. The competence required of the personnel in the project team should also be made explicit.

Schedules the resources and applies appropriate smoothing and levelling until an optimised plan is achieved.

Obtains agreement with line management/resource owners for resource assignments to the project.

Places the schedule and resource allocation plan under change control.

Controls the resources with respect to changes to project scope and resource availability.

Manages introduction and release of project resources throughout the project.

TC17 INFORMATION MANAGEMENT AND REPORTING (TC17)

Information management is the collection, storage, dissemination, archiving and appropriate destruction of project information. Information reporting takes information and presents it in an appropriate format which includes the formal communication of project information to stakeholders.

Plans the information management system for the project and agrees it with stakeholders, ensuring all of their information needs are met.

Ensures compliance with the organisation's data and information policies and any regulatory requirements.

Implements the project information management and reporting system.

Implements procedures for processing documents, including incoming and outgoing information, filing and archiving.

Audits the use of the project information management and reporting system.

Communicates the project information to stakeholders.

TC18 PROJECT MANAGEMENT PLAN (TC18)

The project management plan (PMP) brings together all the plans for a project. The purpose of the PMP is to document the outcomes of the planning process and to provide the reference document for managing the project. The PMP is owned by the project manager.

Defines the structure and format of the PMP, recognising that it could comprise one or more documents depending on the size, need and complexity of the project.

Works with the project team and stakeholders to ensure that the PMP answers the why, what, how, how much, who, when and where questions for the project.

Documents and confirms the high-level background and rationale for the project, referencing any other relevant detailed documentation (why).

Documents and confirms the overall objectives, scope, high-level deliverables/products (including acceptance criteria), and success criteria (project KPIs) for the project. Ensures constraints, assumptions and dependencies are documented and understood (what).

Documents and confirms the governance for the project, including the life cycle/approach, management controls (reporting and handover mechanisms), relevant tools and techniques (how).

Documents and confirms the project estimates, overall budget and cost management processes (how much).

Documents and confirms the project organisational breakdown structure (OBS), defining key roles and responsibilities, and confirms the resources to be used, including third-party responsibilities (who).

Documents and confirms the project schedule, critical path, including milestones (when).

Documents and confirms where the work will be performed, including geographical locations and time zone working arrangements as required for all participants (where).

Obtains formal acceptance of the key elements of the project management plan as they are produced or updated, and places them under configuration management.

TC19 CONFIGURATION MANAGEMENT (TC19)

Configuration management comprises the technical and administrative activities concerned with the creation, maintenance and controlled change of the configuration throughout the project life cycle.

- Prepares and executes a configuration management plan in line with project and organisation requirements.
- Identifies, documents and communicates all components of project deliverables and allocates an appropriate configuration numbering system to each which will enable their status and history to be determined.
- Identifies the agreed baseline of each deliverable (or deliverable component) and places them under configuration control such that subsequent changes may be made only via the agreed change control procedure.
- Documents /records and reports on all current and theoretical data concerned with each configuration item (project deliverables/products).
- Carries out reviews and audits to ensure that there is conformity between all configuration items (project deliverables/products).

TC20 CHANGE CONTROL (TC20)

Change control is the process that ensures that all changes made to a project's baselined scope, time, cost and quality objectives or agreed benefits are identified, evaluated, approved, rejected or deferred.

- Decides upon, agrees and implements a change control policy for the project that provides a formal mechanism for: recording any proposed changes, assessing their likely impact. Obtaining the relevant stakeholders' decision on: Rejecting the change, deferring until later, accepting change along with the corresponding changes to cost and timescale.
- Captures and logs all proposed changes to the agreed scope and objectives of the project, e.g. a change to accommodate a need not originally defined to be part of the project.
- Conduct an impact analysis on the consequences of proposed changes to the project (in terms of time, cost and quality), the business case and benefits management plan.
- Defines various responsibilities and authority levels so that routine changes can be dealt with efficiently, but significant changes receive due management attention.
- Gets changes accepted or rejected and maintains the change log.
- Plans, executes, controls and closes approved changes.
- Reports the status of changes throughout the project.

TC21 IMPLEMENTATION (TC21)

Implementation is the third phase of the project life cycle, during which the project management plan is executed, monitored and controlled. In this phase the design is finalised and used to build the deliverables.

- Reviews and revises where necessary the design and build stages of the project management plan.
- Executes the design and build stages of the project as defined in the project management plan.
- Procures resources, and develops and assigns work packages.
- Monitors progress against plan and prepares regular progress reports.
- Reviews progress with the sponsor and agrees any remedial actions against project scope and business case, ensuring benefits are still valid.
- Assesses risks (threats and opportunities) and maintains the risk log and any response plans.
- Assesses issues and ensures follow-up actions are completed.
- Manages changes in accordance with the agreed change control policy.
- Ensures the quality plan is adhered to and delivers the desired quality of deliverable.

TC22 TECHNOLOGY MANAGEMENT (TC22)

Technology management is the management of the relationship between available and emerging technologies, the organisation and the project. It also includes management of the enabling technologies used to deliver the project, technologies used to manage the project and the technology of the project deliverables.

- Discusses, defines and agrees the technology management strategy for the project, ensuring buy-in from stakeholders and alignment with their overall technology management strategy.
- Ensures the risks (threats and opportunities) of adopting any new or emerging technologies are fully understood by, communicated to and agreed with relevant stakeholders.
- Ensures that the deployment of new technologies is compatible/interfaces with existing technologies and related products, and those which will form the environment into which the project will deliver.
- Calculates the cost of the technology management strategy and incorporates corresponding risk premiums into the estimates and resource requirements (skills and competences) for the project.
- Monitors the adoption and implementation of the technology management strategy, identifies and escalates issues and highlights risks (threats and opportunities) as soon as these are relevant.

TC23 BUDGETING AND COST MANAGEMENT (TC23)

Budgeting and cost management is the estimating of costs and the setting of an agreed budget, and the management of actual and forecast costs against that budget.

Estimates and evaluates costs of each work package, including overhead costs using work breakdown structure/product breakdown structure.

Establishes and agrees overall budget including tolerances, risk premium, assumptions and exclusions based on the business case and investment appraisal.

Identifies when expenditure will take place and develops a cash flow forecast, ensuring funds will be available when required.

Establishes cost monitoring and controlling elements, as well as inflation and currency management if necessary.

Reports on financial performance to stakeholders in line with project and organisation requirements.

Monitors forecast vs. actual resource usage and costs or expenses incurred, taking into account any approved changes.

Captures key project metrics for actuals versus estimates and ensures these are fed back into the estimating process/systems.

Forecasts cost trends and final costs, noting variations, and develops and applies corrective actions as necessary.

Completes all financial transactions and updates the final costs as per the project and organisation requirements.

TC24 PROCUREMENT (TC24)

Procurement is the process by which the resources (goods and services) required by a project are acquired. It includes development of the procurement strategy, preparation of contracts, selection and acquisition of suppliers, and management of the contracts.

Clarifies requirements and specifications for key products and services.

Investigates the technical and commercial options for fulfilling the requirements, including possible sources of supply, and agree the preferred options (contractual arrangements) and potential suppliers with the business.

Ensures that suppliers are approved in accordance with agreed procedures.

Manages the tender, evaluation and selection process.

Negotiates with preferred suppliers, prepares contracts (including appropriate terms and conditions) and technical schedules, and develops acceptance procedures and criteria, recognising the organisations overarching procurement procedures and authorisation limits as applicable.

Manages the placement of contracts and ensures effective management of the contract in respect of relationship with the suppliers and monitoring of their performance.

Implements, maintains and disseminates procurement strategy, policy, standards, methods and processes relating to the project.

TC25 ISSUE MANAGEMENT (TC25)

Issue management is the process by which concerns that threaten the project objectives and cannot be resolved by the project manager are identified and addressed to remove the threats they pose.

Is aware of the need to manage issues that, if left unresolved, could threaten the success of a project.

Prepares and maintains an issue log to facilitate the progress tracking of project issues from identification to resolution and closure, ensuring each is allocated an owner responsible for resolution.

Is aware of the common failures in the management of issues: Failure to identify the difference between an issue, a problem (a concern that a project manager can deal with on a day-to-day basis) and a risk. Failure to escalate to the appropriate level when resolution is not achieved in a timely manner.

Continuously monitors and reports to the project sponsor/ project steering group the 'ageing of issues', and ensures that issues are taken up to the sponsor/project steering group so that resolution can be reached.

TC26 DEVELOPMENT (TC26)

Development is the progressive working up of a preferred solution to an optimised solution during the and implementation phases. The optimised solution is refined with the stakeholders against the requirements.

Identify and agree the development methodology to be used.

Engage with stakeholders and users throughout the development process, managing expectations and maintaining commitment as the solution develops.

Apply a phased development approach with design documentation reviews, quality reviews and lessons-learned reviews as the project proceeds from to implementation.

Appreciate and ensure continual management of the solution development through progressive testing of emerging solutions against identified requirements.

TC27 VALUE MANAGEMENT (TC27)

Understands and communicates the concept of value management, the concepts of value and their function and purpose within the project.

Understands and applies the structure of the VM team and role of the value manager.

Maintains audit trails and records of implementation.

Establishes and agrees an integrated and baselined EVM plan by profiling anticipated progress (measured to agreed standard, e.g. delivery, cost, etc.) over time, and places it under configuration management.

Documents planned work, cost to achieve planned work and whether the work achieved is costing more or less than what was planned.

TC28 EARNED VALUE MANAGEMENT (TC28)

Earned value management (EVM) is a project control process based on a structured approach to planning, cost collection and performance measurement. It facilitates the integration of project scope, time and cost objectives and the establishment of a baseline plan for performance measurement.

Establishes and agrees an integrated and baselined EVM plan by profiling anticipated progress (measured to agreed standard, e.g. delivery, cost, etc.) over time, and places it under configuration management.

Analyses whether the project is ahead or behind the planned schedule.

Continuously measures ongoing efficiency and performance in terms of project scope, time and cost.

Interrogates data to identify problems, corrective actions and replanning if required.

Documents planned work, cost to achieve planned work and whether the work achieved is costing more or less than what was planned.

Where so required by procurement contracts, make supplier payments according to earned value achievements as agreed.

Calculates, documents and communicates variance and trend analyses.

TC29 VALUE ENGINEERING (TC29)

Value engineering (VE) is concerned with optimising the conceptual, technical and operational aspects of a project's deliverables. It utilises a series of proven techniques during the implementation phase of a project.

Understands and communicates the role of value engineering, the concepts of value and their function and purpose and the link to value management within the project.

Understands and communicates the benefits of value engineering.

Understands and communicates the key principles of value engineering: Management style, positive human dynamics, internal/external environment, methods & tools.

Defines the structure of the VE team and communicates the role of the value engineer.

Knows when, where and how to apply the methods and tools of value engineering.

Applies VE structured problem solving techniques when appropriate

Analyses the structure, scope and context of the project.

Optimises the conceptual, technical and operational aspects of the project.

Ensures any links are identified between VE and risk management.

Maintains audit trails and records of implementation, including lessons learned, and applies them to future projects

TC30 HANDBOOK & CLOSEOUT (TC30)

Handover and closeout is the fourth and final phase in the project life cycle. During this phase final project deliverables are handed over to the sponsor and users. Closeout is the process of finalising all project matters, carrying out final project reviews, archiving project information and redeploying the project team.

Formalises the project completion process, hands over operational documents and agrees on a process to resolve open issues.

Undertakes an assessment of the readiness of the business to accept and utilise the project deliverables/products. Ensures that all of the required project deliverables/products have been delivered to and accepted by the required stakeholders, agreeing ownership of any outstanding requests for change and open risks and issues, with plans for resolution.

Obtains appropriate sign-off certificates and agreements on handover of responsibility for all deliverables/products from required stakeholders.

Closes contracts with contractors and suppliers.

Completes all financial transactions and update the final costs.

Obtains formal project closedown from the steering group or other appropriate governance forum.

Conducts a post project review, evaluates and documents lessons learned, and applies them to future projects.

Releases human resources and other assets, dissolves project organisation, obtains release from project management role and hands over responsibility to project owner.

Archives project records.

Schedules benefits realisation review(s) to be carried out by the project sponsor at a date in the future.

BEHAVIOURAL COMPETENCE DOMAIN

BC01 COMMUNICATION (BC01)

Communication is the giving, receiving, processing and interpretation of information. Information can be conveyed verbally, non-verbally, actively, passively, formally, informally, consciously or unconsciously.

Effectively communicates to stakeholders throughout the project's lifecycle enabled by the analysis of stakeholders' and team members' communication needs and preparation of a communication plan.

Develops and executes the communication plan using formal and informal mechanisms as required throughout the project's lifecycle and in order to deliver the project successfully.

Acknowledges own personal style of communication and the impacts it has on others (including language, tone and body language). Actively listens and is able to adapt own style appropriate to the situation and target audience.

Seeks feedback on the effectiveness of the communication and continuously revises the plan according to the needs of the audience.

Evaluates and takes appropriate actions on issues that could result in ineffective communication.

Communicates the decisions and the reasons for the decisions to team members. Encourages top-down and bottom-up communication from all members of the project team.

BC02 TEAMWORK (BC02)

Teamwork is the process whereby people work collaboratively towards a common goal, as distinct from other ways that individuals can work within a group.

Builds and maintains an effective project team throughout the project lifecycle. In doing so is aware of the different stages of team development and the different models that can be applied.

Develops the team objectives and agrees ways of working with the team.

Manages the requirements of the various team members and the circumstances and interests of individuals throughout the project.

Takes pride in the project and the team's achievements, provides regular feedback to the team and recognises and acknowledges contributions from individual team members.

Communicates regularly with the project team and wider networks.

Asks for support and offers assistance as appropriate

Contributes positively to address problems and devises solutions with the team.

BC03 LEADERSHIP (BC03)

Leadership is the ability to establish vision and direction, to influence and align others towards a common purpose, and to empower and inspire people to achieve project success. It enables the project to proceed in an environment of change and uncertainty.

Promotes and upholds the project vision, reinforces positive relationships, builds an environment that supports effective teamwork, raises morale and empowers and inspires others to follow throughout the lifecycle of the project.

Determines what leadership style is appropriate for the particular situation, individual or group and adapts style as appropriate.

Creates an environment which encourages high performance and enables team members to reach their full potential.

Gains the trust, confidence and commitment of others and utilises collaboration throughout the lifecycle to ensure the continued momentum of the project.

Builds and maintains the motivation of the team throughout the project.

Agrees SMART performance objectives for the team and individuals which are regularly reviewed and monitored to provide prompt and constructive feedback.

Identifies and addresses development needs of the team and self.

BC04 CONFLICT MANAGEMENT (BC04)

Conflict management is the process of identifying and addressing differences that, if unmanaged would affect project objectives. Effective conflict management prevents differences becoming destructive elements in a project.

Manages the differences of opinion of stakeholders, recognising the levels of power and influence of each and the potential impact of own views.

Listens to and respects the views and questions of others.

Anticipates and prepares for potential conflict situations that may have an impact on the project.

Identifies when conflict situations arise and ensures that appropriate conflict management techniques are employed to enable effective resolution.

Identifies the root causes rather than the symptoms of the conflict and is creative in seeking paths to resolution.

Implements an agreed solution and monitors the ongoing situation, being alert to signs of emerging conflict.

Knows when to escalate or engage others when conflict cannot be resolved.

Ensures appropriate stakeholders are aware that the conflict has been dealt with to the satisfaction of interested parties and to the benefit of the project.

BC05 NEGOTIATION (BC05)

Negotiation is a search for agreement, seeking acceptance, consensus and alignment of views. In a project it can take place on an informal basis throughout the project life cycle or on a formal basis such as during procurement, and between signatories to a contract.

Identifies areas for negotiation and prioritises appropriately.

Decides on the desired outcome and minimum acceptable position, recognising the extent of own remit and the point at which escalation may become necessary.

Distinguishes between negotiating position and real underlying need.

Collects and analyses all available information and develops options to achieve agreement.

Sets out a negotiation strategy, understanding the motivation, wants and needs of all parties.

Ensures the project team and stakeholders fully understand and support the strategy.

Considers practical options and prioritises those presenting the optimal solution for the project.

Negotiates firmly at the content level but maintains a positive personal relationship with all parties involved.

Explores and evaluate responses, repeating steps in the negotiation process as many times as necessary until a satisfactory conclusion is reached.

Ensures the result is documented and communicated to relevant parties.

BC06 HUMAN RESOURCE MANAGEMENT (BC06)

Human resource management (HRM) is the understanding and application of the policy and procedures that directly affect the people working within the project team and working group. These policies include recruitment, retention, reward, personal development, training and career development.

Understands and applies the HRM policies of the organisational units supplying resources to the project and all relevant legal, regulatory and other industry obligations.

Prepares and ensures appropriate induction into the project environment for all project team members.

Explains to each project team member what is expected of them recognising their individual personal circumstances, motivations, interests and goals, in particular any development opportunities arising from the assignment.

Maintains regular contact with the line managers of team members on issues regarding performance and progress on learning and development opportunities.

On closing down the project, redeploy each team member and release them to their organisational units, with an appropriate acknowledgement of their contribution to the project.

BC07 BEHAVIOURAL CHARACTERISTICS (BC07)

Behavioural characteristics are the elements that separate and describe a person's preferred way of acting, interacting and reacting in a variety of situations. They complement knowledge and experience and are a function of values, beliefs and identity. They can be used in assessment, engagement and career advice.

Has an open, positive, 'can-do' attitude which builds confidence and credibility both within the team and stakeholders.

Identifies and adopts sensible, effective, straightforward solutions.

Is open to new ideas, practices and methods and gives consideration to the plurality of the views on the project.

Adapts thinking and behaviour to the requirements of the project, the needs of the sponsor, its environment and the people working on it to ensure a successful outcome.

Articulates innovative strategies and solutions to identify ways of working with disparate resources and interests to achieve project objectives.

Identifies and understands threats and opportunities and takes risks prudently.

Respects all human values and reflects contract particulars, appointment conditions, legal agreements and legislation.

Focuses on project objectives with a strong orientation towards achievement of goals, targets and benefits.

BC08 LEARNING & DEVELOPMENT (BC08)

Learning and development involves the continual improvement of competencies in the organisation. The identification and application of learning within projects develops the organisation's capability to undertake current and future projects.

Develops the team and self according to the relevant learning & development policies and processes.

Assesses the skills and levels of competence of project team members and identifies any development needs.

Assists and identifies development opportunities, and encourages project team members to undertake learning and development.

Evaluates the extent to which team members have applied the knowledge and skills gained during their development.

Considers learning and development to be a lifelong activity, and is aware of and promotes the need to undertake continuing professional development (CPD) in order to keep pace with changing standards, techniques and methods.

BC09 PROFESSIONALISM & ETHICS (BC09)

Professionalism and ethics both relate to proper conduct. Professionalism is demonstrable awareness and application of qualities and competencies covering knowledge, appropriate skills and behaviours. Ethics covers the conduct and moral principles recognised as appropriate within the project management profession.

Honestly represents self at the appropriate level of competence which can be evidenced by appropriate continuing professional development, qualifications, knowledge and experience.

Understands the relevant commercial and legal relationships, and behaves with integrity and in an equitable manner with good faith and good conscience.

Adopts a morally, legally and socially appropriate manner of behaviour and working with all members of the project team and stakeholders.

Is alert to possible unethical situations arising, or proposals being made, that affect the project, the environment and individuals working on it. Is sure to maintain transparency in bringing such issues into the open and escalating them to resolve differences.

Encourages a culture of openness and honesty within the project.

CONTEXTUAL COMPETENCE DOMAIN

CC01 PROJECT SPONSORSHIP (CC01)

Project sponsorship is an active senior management role, responsible for identifying the business need, problem or opportunity. The sponsor ensures the project remains a viable proposition and that benefits are realised, resolving any issues outside the control of the project manager.

Is aware of what motivates the various stakeholders and is able and empowered to address their interest in the project.

Is aware of the role and responsibilities of the project sponsor and how it changes through the project life cycle.

Is aware of the levels of commitments and support needed for effective project sponsorship.

Demonstrates why effective sponsorship is important to project management, recognising the following key attributes for a project sponsor: is a business leader and decision-maker across functional boundaries is an advocate for change and the project is committed in terms of time and support of the required role is experienced in project management

Ensures that any obstacles faced by a project are addressed.

CC02 HEALTH, SAFETY AND ENVIRONMENTAL MANAGEMENT (CC02)

Health, safety and environmental management is the process of determining and applying appropriate standards and methods to minimise the likelihood of accidents, injuries or environmental impact both during the project and during the operation of its deliverables.

Apply appropriate laws and regulations.

Identifies health, safety and environmental risk and impact of the project.

Develops plans and implements processes to manage the impact on health, safety and the environment.

Monitors and controls the effectiveness of the health, safety and environmental plans.

Reports health, safety and environmental issues and risks.

Documents lessons learned and applies them to future projects, to phases of the project or elsewhere in the organisation.

CC03 PROJECT LIFE CYCLES (CC03)

Project life cycles consist of a number of distinct phases. All projects follow a life cycle and life cycles will differ across industries and business sectors. A life cycle allows the project to be considered as a sequence of phases which provides the structure and approach for progressively delivering the required outputs.

Identifies an appropriate life cycle model for the project, taking into account the project characteristics and environment.

Phases the project accordingly, with a suitable number of evaluation and approval points (gates) to monitor project progress.

Uses the project phases for effective management of resources.

CC04 PROJECT FINANCE AND FUNDING (CC04)

Project financing and funding is the means by which the capital to undertake a project is initially secured and then made available at the appropriate time. Projects may be financed externally, funded internally, or there may be a combination of both.

Analyses financing options/models for project, including private finance initiative, public-private partnership, etc.

Negotiates with possible sources of funds and determines conditions attached.

Selects and secures an appropriate source of project funding, with the approval of the project sponsor and/or organisation.

Calculates financial resource usage and cash flows of the project.

Establishes and controls processes and authorisations for payments.

Recognises or establishes and controls bookkeeping and financial auditing systems.

Validates and manages budgets, covering actual costs incurred to date and forecasts to complete, and reports as required to the project sponsor and the organisation.

CC05 LEGAL AWARENESS (CC05)

Legal awareness provides project management professionals with an understanding of the relevant legal duties, rights and processes that should be applied to projects.

Is aware of and applies the legal and contractual requirements within which the project operates, being aware of own commercial obligations and personal liability.

Investigates and describes for the organisation the relevant legal aspects that apply to the project.

Initiates and manages processes to ensure that any legal or contractual requirements are adhered to, covering: Time, payments, performance, termination, claims and disputes.

Responds appropriately to claims of harassment, discrimination, safety issues or non-performance.

CC06 ORGANISATIONAL ROLES (CC06)

Organisational roles are the roles performed by individuals or groups in a project. Both roles and responsibilities within projects must be defined to address the transient and unique nature of projects and to ensure that clear accountabilities can be assigned.

Defines an appropriate organisation for the management of the project (organisational breakdown structure, OBS), taking into consideration the context, complexity and business impact of the project.

Defines roles, responsibilities, interfaces, levels of authority and procedures in the project, taking account of the transient and unique nature of projects, in accordance with the OBS for the project, and agrees with and appoints the necessary person(s) to these roles.

Ensures the accountability and responsibilities of the roles are clearly understood by the project team and stakeholders.

Maintains, updates and changes the project organisation during the project life cycle if needed.

CC07 ORGANISATION STRUCTURE (CC07)

The organisation structure is the organisational environment within which the project takes place. The organisation structure defines the reporting and decision making hierarchy of an organisation and how project management operates within it.

Understands and exploits the varying organisational structures (functional, matrix and project) employed by different organisations, and knows which structures operate across the project's environment.

Identifies all the organisational units that will provide resources to the project.

Uses the project organisational breakdown structure (OBS) and defines roles and responsibilities to develop the interfaces between the project and the different parts of the organisation.

Agrees mechanisms to obtain resources from the organisational units.

Maintains, and updates when required, the interfaces with the units of the permanent organisation.

Determines the requirement for a project office and agrees its remit, levels of authority and position within the organisation.

CC08 GOVERNANCE OF PROJECT MANAGEMENT (CC08)

Governance of project management (GoPM) concerns those areas of corporate governance that are specifically related to project activities. Effective governance of project management ensures that an organisation's project portfolio is aligned to the organisation's objectives, is delivered efficiently and is sustainable.

Applies the organisation's overarching governance structure, ensuring it is understood and that the points of interface with the project are clear and workable.

Applies the relevant organisation processes, standards and guidelines, ensuring that they are taken into account in the project plans, and that appropriate key points in the project (as a minimum, initiation, review gates, handover and closeout) are communicated to the wider community.