
Overview

This standard is relevant to archaeologists responsible for the development of projects on behalf of clients and the agreement of contracts to undertake the project. This function is performed both by internal project managers developing a project on behalf of their own organisation and by external consultants who are likely to be working for non-archaeological organisations. This unit involves the definition of aims and objectives for projects.

The starting point is to establish the client's aims and objectives for the project. Who is the 'client'? There may be several: direct clients include those who have appointed the consultant/project manager, those who will pay for the work to be carried out, and those who will be accountable for project outcomes. Indirectly, there may be others whose aspirations and expectations must also be taken into account including political or financial sponsors and/or beneficiaries from the project's successful conclusion. These could be referred to as 'stakeholders'; 'clients' and 'stakeholders' therefore will often be a mix between those directly and indirectly interested in the project and those within and external to the project manager's own organisation.

It is possible that the client's aims originate from poorly defined or vague needs. Hence, included in the standard are the functions of clarifying client and stakeholder aims, assessing factors that influence the achievement of objectives, developing options and final agreement with the clients and stakeholders of objectives to be met.

Performance criteria

You must be able to:

Define aims and initial objectives for the project

- P1 Accurately identify the client(s) and their responsibilities for the project
- P2 Clearly establish the scope of the project
- P3 Accurately interpret the relevant ideas, aims and expectations of the client in enough detail to define the broad objectives
- P4 Determine that the initial objectives are practicable and reach agreement with the client in a manner conducive to their continuing support

Identify and assess factors affecting the achievement of objectives for the project

- P5 Identify significant factors potentially relevant to the initial objectives
- P6 Gather sufficient information to assess the impact of the identified factors on the initial objectives and record these
- P7 Identify and justify to the client the need for specialist advice where it is critical to the assessment process, and obtain required advice
- P8 Accurately assess the impact of identified factors on the initial objectives and present the analysis clearly and in sufficient detail to enable recommendations for changes to initial objectives to be justified

Develop and agree objectives for the project

- P9 Verify that clients' objectives are sufficiently clear to develop feasible project objectives
- P10 Develop project objectives which are as close to the clients' objectives as can be justified by consideration of the impact of the identified factors
- P11 Fully involve clients in the refinement of project objectives to gain their support for decisions
- P12 Develop and agree with clients criteria which are suitable to select preferred project objectives from options
- P13 Defining project objectives in terms of measurable outcomes
- P14 Agree project objectives with clients in a manner conducive to their continuing support

Knowledge and understanding

You need to know and understand:

- K1 How to identify and clarify clients' aims, expectations and objectives
- K2 How to negotiate with clients
- K3 Clients' aims and strategic objectives and the influence of these on the project
- K4 What work would be necessary in order to fulfil the clients' aims, objectives and expectations
- K5 The types of short term and long term objective
- K6 How to assess factors
- K7 How to communicate - orally and in writing - to clients the impact of significant factors upon their initial objectives
- K8 The factors peculiar to or of particular significance to the project context
- K9 Others' experience in carrying out similar activities
- K10 The significance of activities which impinge on the project
- K11 The commercial context of project
- K12 The regulatory context of project
- K13 The technical and ethical standards relevant to the project
- K14 The sources and types of specialist advice
- K15 How project objectives are expressed for internal and external clients
- K16 The means of gaining agreement and support - formal, informal
- K17 The relevant criteria for selecting options and their application
- K18 Targets and performance indicators relevant to the project type and the project organisation

CCSAPAB2

Develop and agree objectives for archaeological projects

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