



Achieving Excellence in Construction

Procurement Guide

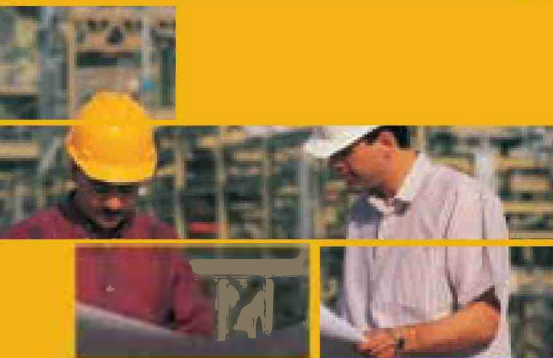
02

Project organisation

roles and responsibilities



Office of Government Commerce



02

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NAO endorsement

The NAO recognise that proactive client leadership and robust project management are pre-requisites to the successful delivery of construction procurement.

They consider that procurement of construction should be on the basis of whole-life value for money and endorse the use of the good practice promoted by this suite of guides. They may investigate whether this good practice is applied in practice in any future examination.

Acknowledgements

This guide has been published after extensive consultation within government and valuable contributions from leading individuals and organisations across the construction industry.

OGC would like to thank all who have contributed.

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The Achieving Excellence Procurement Guides

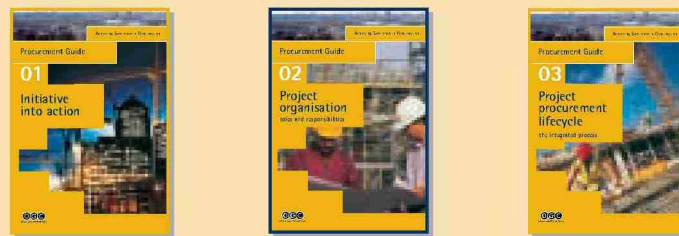
The Achieving Excellence suite of procurement guides replaces the Construction Procurement Guidance series.

The new series reflects developments in construction procurement over recent years and builds on government clients' experience of implementing the *Achieving Excellence in Construction* initiative.

High level guides



Core guides



Supporting guides



02 Project organisation: roles and responsibilities

Projects should be organised in such a way that everyone is committed and empowered to achieve successful delivery. Roles and responsibilities should be clearly defined; there must be short and effective lines of communication to senior management so that they can take prompt action when needed.

Introduction

This guide explains the key roles and responsibilities involved in construction procurement projects. It provides a recommended framework for project organisation that can be adapted to individual circumstances.

There are obvious benefits to applying a consistent approach and common language across clients. OGC recommends the terminology set out in this guide, which harmonises approaches used across the public sector. However, clients in different parts of the public sector may be using different terminology that is already widely adopted in their community, although the actual functions of the roles are identical. Terminology need not be a barrier to common ways of working; what matters is that the principles set out in this guide are followed, so that everyone involved in the project knows what they have to do and when, their personal accountability and their reporting lines.

Principles

Critical factors for success

The client organisation must ensure that:

- the business needs of the project are well established and understood by the client and supplier alike. In particular, the expected life of the facility must be clear; many facilities are only required to fulfil a short-term need but are built for the long term when that is not necessary – and vice versa
- the investment decision maker for the project approves the need for the project in terms of contributing to business objectives
- the right people are given the roles of senior responsible owner – SRO (that is, the individual responsible for the success of the project) and project sponsor (empowered to take decisions on behalf of the SRO role), with the knowledge of the desired outcome for the business, experience, skills and commitment to achieve success
- the right suppliers are selected to act as partners – organisations with the capability and capacity to deliver; and compatible objectives to ensure project success
- everyone involved in the project works together as an integrated team (client, designers, constructors and specialist suppliers), with effective communication and coordination across the whole team
- the right person is assigned the role of project manager with the ability to create and lead the project team



- the impact of the project and its outcome on the organisation is analysed and planned to ensure that it is integrated and aligned with the business
- levels of delegated authority for the project team are clearly set out and understood and enable effective and timely decision-making
- clear roles and responsibilities are defined and understood, supported by an uncomplicated project management structure that reflects good practice
- the procurement route for the project supports and facilitates integrated teamworking.

The client organisation undertaking each project should have clearly identified responsibilities for investment decisions, project ownership and project sponsorship; the people concerned should have formal statements of their responsibilities and be accountable for them. The senior responsible owner role should be a formal appointment in the part of the business that requires the finished project, with sufficient seniority to understand the business drivers and to make decisions on behalf of the business. Priority should be given to ensuring that project delivery teams are composed of high quality individuals; there must also be a commitment to continuity in key roles.

Wherever possible, the project should be delivered by an integrated project team made up of the client project team, consultants, constructors and specialist suppliers working together as a single team. This approach should be used on all construction projects because it helps to encourage innovation and avoid an adversarial culture; it encourages collective responsibility for a successful outcome. It can bring significant benefits – a focus on whole-life value for money, rather than lowest price; collective responsibility for buildability and considerations of health and safety, sustainability and design quality; shared responsibility for managing risk; greater efficiency and reduced waste (see *AE5: The integrated project team* for more information). The details of an integrated approach will vary depending on the contractual arrangements; the important point is that integration should always be the main feature.

Essential roles and responsibilities

Essential roles and the associated responsibilities are:

- investment decision-making – takes the investment decision for use of resources (including capital, operational and manpower resources) based on justification of the business need, affordability and cost-effectiveness, and whole-life value for money (the **investment decision maker** or IDM)
- ownership – defines the scope of the project for delivering the business benefits; personally accountable for the success of the project (the **senior responsible owner** or SRO (often referred to as the project owner). This role should be undertaken by a senior individual in the organisation, who should have the status and authority to provide the necessary leadership and must have clear accountability for delivering the project outcome. This individual should also ensure that sufficient resources are made available to enable a successful outcome

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- interface between ownership and delivery – ongoing day-to-day management and decisions on behalf of the SRO to ensure that the desired project objectives are delivered; this individual must have adequate knowledge and information about the business and the project to be able to make informed decisions (the **project sponsor**)
- provision of independent advice to the client – independent advice may be required on a range of issues, including business strategy, investment appraisal, financial, legal, and technical aspects). This is the role of **independent client advisers**, who may be appointed to assist the project sponsor; sometimes they may be appointed early on in a project to support the SRO. They should be independent from suppliers to avoid any conflict of interest.

Different terms may be found in use across the public sector, although the functions of each key role are similar. Figure 1 shows the recommended OGC terms, together with equivalents that are widely used in other parts of the public sector.

1 Equivalent terms for key roles

Function	OGC term	Also known by this term
Responsible for making the investment decision	Investment decision maker	Project sponsor (APM)
Ownership of the project at a senior level	Senior responsible owner	Project owner Project sponsor (local government)
Interface between the client team and supply team via the project manager, as the main day-to-day client representative	Project sponsor	Project director (NHS) Client manager (local government)
Managing the project and project team	Project manager	

In addition, but often outside the client organisation are:

- project management – leading, managing and coordinating the integrated project team on a day-to-day basis (the **project manager**, who may be independent of the supplier team and seconded to the client). The client must ensure that the project manager is appropriately qualified and experienced for the role
- supply team – delivers the required outputs or deliverables. The team may include designers and other consultants (cost consultants, engineers, etc),



constructors and specialist suppliers (such as manufacturers). They should be an integrated team with collective responsibility for project delivery and management of risks (including health and safety aspects). Its members should be brought together at the earliest opportunity to work with the client's project members as a single team, preferably during the planning stages of the project

- facility managers – manage the completed facility on behalf of the client. They should be involved early in the project at the design stage, whether or not they are responsible as members of the integrated project team for design, construction, operation and maintenance.

Stakeholder involvement

The project sponsor should ensure that stakeholders, including user representatives, provide important input in developing the outputs required from the project.

There may also be a requirement for a project board – an advisory panel including a technical adviser and business adviser, to address strategic issues and ensure stakeholder buy-in at a high level.

For smaller projects there is unlikely to be a project board, but it will still be important to capture the views of users and stakeholders. The key delivery roles will be those of the senior responsible owner (responsible for project success), project sponsor and project manager (responsible for project delivery).

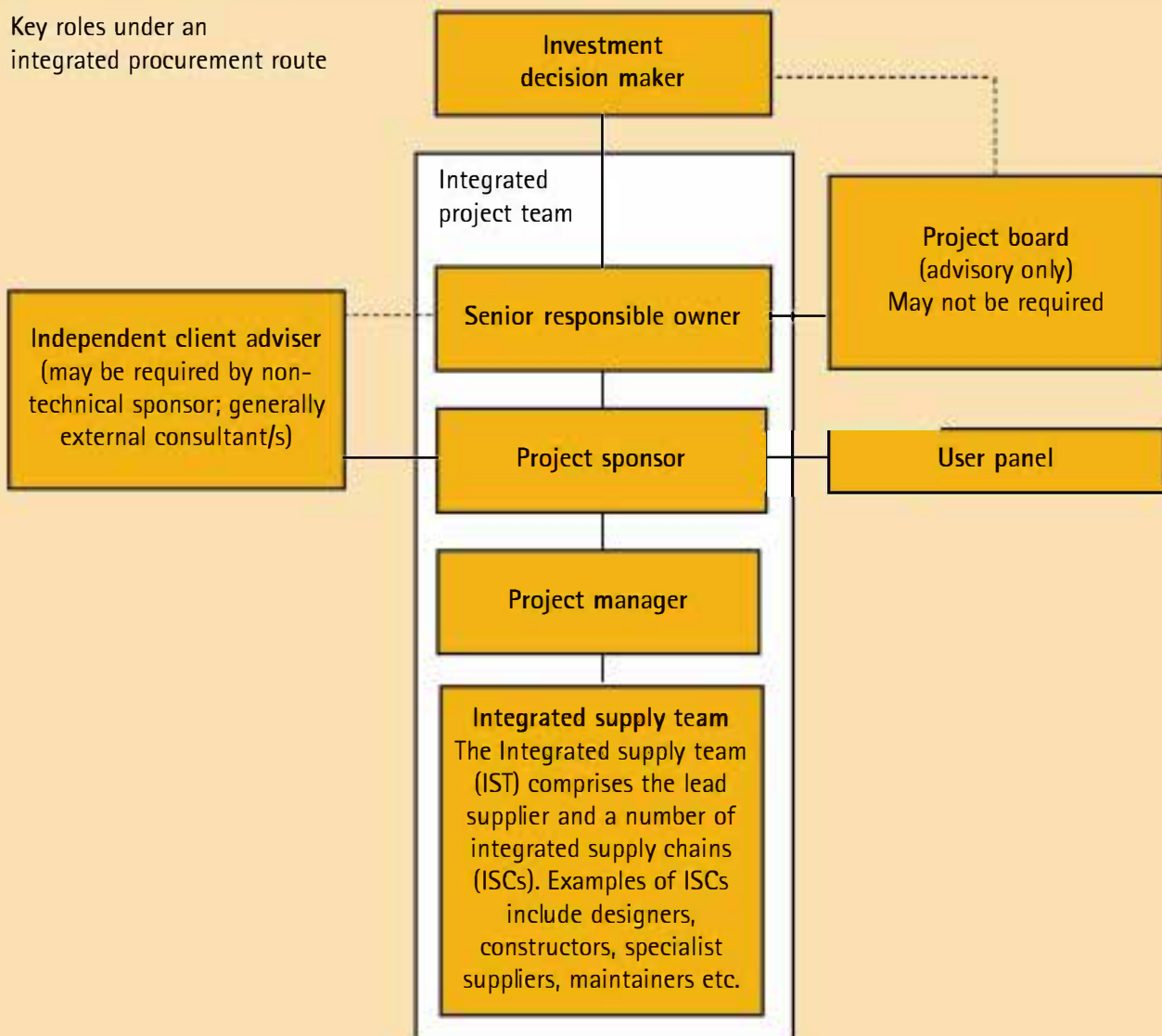
Combining roles

For smaller or less complex projects some roles may be combined, but only if the person combining the roles has the required competencies, experience, expertise and time to commit to the task. The roles of investment decision maker/SRO, SRO/project sponsor or project sponsor/project manager can be combined for smaller or straightforward projects, where a single individual can fulfil the responsibilities of both roles. Where roles are combined, the allocation of the functions must always be absolutely clear. Where two roles are combined, the person appointed must have at least the authority and status of the 'higher' role. However, it is important to note that the three roles of investment decision maker, senior responsible owner and project sponsor cannot be allocated to a single individual because of the risk of conflict of interest. In addition, note that roles that do not overlap should not be combined – for example, the roles of SRO and project manager should not be combined, with a different individual taking the role of project sponsor.

02 Project organisation: roles and responsibilities

Figure 2 shows the overall relationships between the key roles. The client should partner with the integrated supply team to form the integrated project team. The relationships with the supply team should be as part of an integrated team. Management structures to support decision-making and day-to-day activity of project delivery should have clear lines of reporting and decision-taking. Note that it may not always be necessary to allocate each role to a different individual as described in the section on roles above.

2 The integrated approach





Reporting and decision-making

The important points to note about reporting and decision-making are:

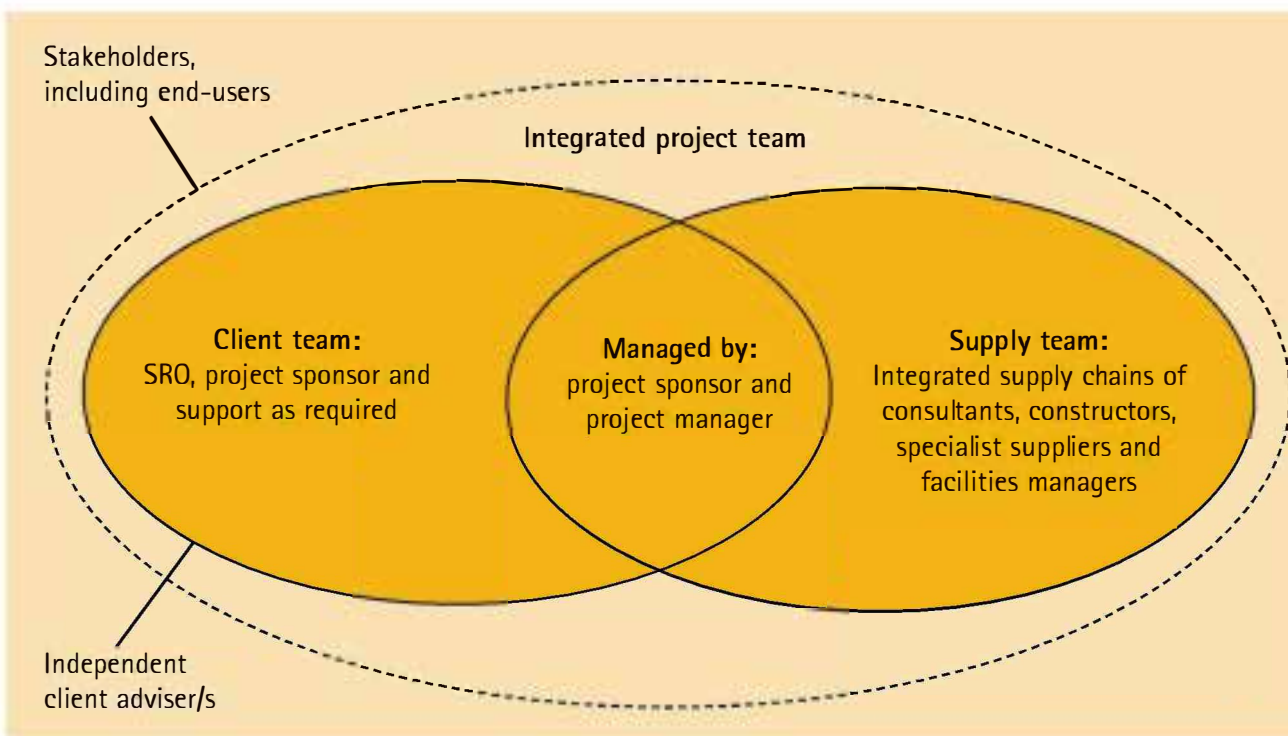
- lines of reporting should be kept as short as possible and very clear
- delegations and individual responsibilities for decision-taking are clearly established at the outset and understood by everyone involved in the project. They should be set out in the Project Execution Plan (PEP).

Experience has shown that, where these conditions are not met, the likelihood of conflicting, poorly informed or delayed decisions significantly increases the risk of failure of the project. There must be a single interface or point of contact between the project sponsor (representing the client) and the project manager (interface with the supply team).

Practice

Figure 3 shows the roles within an integrated project team involved in a typical construction project. The client roles of investment decision-maker, senior responsible owner and project sponsor are described in detail in this guide, together with outlines of the requirements for an independent client adviser and project manager. For details of supply team and independent client adviser roles, please see the companion guide *AE5: The integrated project team: teamworking and partnering*.

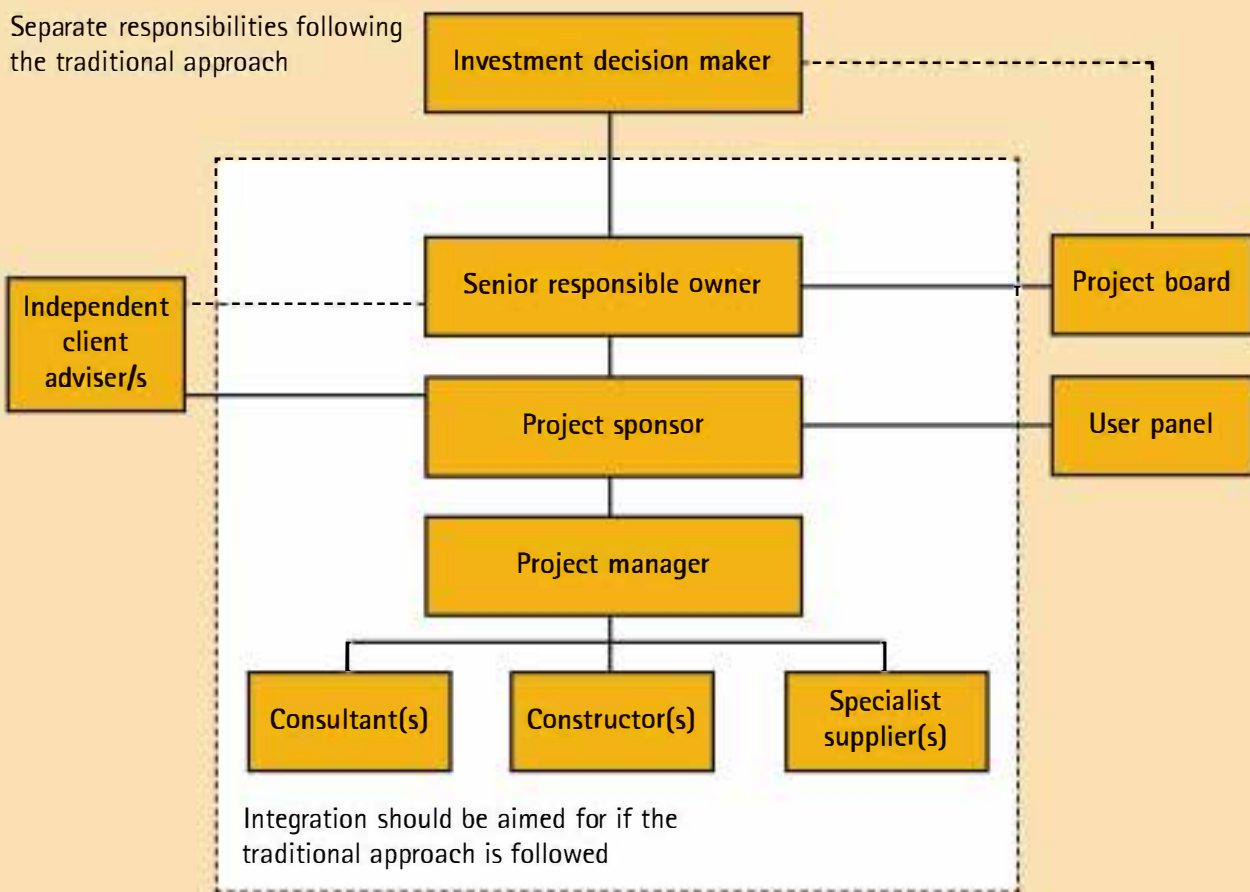
3 The integrated project team



02 Project organisation: roles and responsibilities

A traditional project structure is not integrated; it separates out the responsibilities of each party (see Figure 4). For this reason it should not be followed unless it demonstrates significantly better value for money than the recommended procurement routes (see *AE6: Procurement and contract strategies*). However, even with this fragmented approach it is possible to aim for some level of integration (see *AE5*).

4 Traditional approach





The investment decision maker

The investment decision maker (IDM) is the role in the client organisation that decides whether or not a proposed investment in a project should be made. The role may be assigned to an individual or to a group (such as the management board). The IDM should be responsible for the approval of the project and thereafter maintain the visible and sustained commitment of senior management to its delivery. The role might be at ministerial, board or senior management level, depending on the size and complexity of a project. On a major project significantly affecting the department's budget, reputation or operation, the role could fall to an Accounting Officer or Chief Executive. Where the role is assigned to an individual member of the management board, the IDM would be answerable to colleagues for the successful delivery of the project in the interests of the business as a whole. The decision to invest in a project should be based on demonstrable business drivers and benefits, achieved within a whole-life value for money framework.

Achieving Excellence in Construction: checklist for managers shows where the Gates fit along the project planning route. The project should not proceed beyond these points until specific management and funding activities have been completed. At each decision point, the IDM should evaluate the business case and investment proposals and if justified, give approval for the project to proceed. (See the OGC Successful Delivery Toolkit for details of the Gateway process and the *Gateway Checklist for Managers* at www.ogc.gov.uk/sdtoolkit/workbooks/gateway/gateway.html)

It is important to note that for construction projects there are two additional major decision points, usually between Gates 3 and 4 (outline design and detailed design). For details of the project process and steps, see the companion guide *AE3: Project procurement lifecycle*.

At the first Gate (Gate 0), the IDM makes a strategic assessment of the proposed project, its contribution to the business strategy, drivers and benefits and considers the high level options for a solution.

Following a detailed options appraisal in line with the principles of HM Treasury's Green Book (at Gate 1), the IDM should be satisfied that:

- there is a business need for the project
- success criteria have been defined
- the business drivers and expected benefits have been established with stakeholders
- all options (including PFI) for meeting the business needs have been evaluated, together with the risks and the consequences of their occurrence associated with each option
- the risks are clearly identified, together with their potential impact on the project in terms of quality, cost and time.

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- the estimated cost is made up of the whole-life costs of the project, including the risk allowance and base estimate
- the estimated cost includes fees, in-house costs and any financing costs
- there is a clear understanding of the key issues on which the business case and investment proposals are based
- an appropriate management structure (lines of accountability and delegated authority) is in place and named individuals have been appointed as senior responsible owner and project sponsor
- the project is likely to provide whole-life value for money for the department's business as a whole
- the senior responsible owner and project sponsor are competent for the particular project and will undertake training in any areas where skills gaps have been identified (see the matrices at the end of this guide).

The IDM, when considering a change in the scope or direction of a project, must take account of impact on the department in terms of risks, quality, cost and time before reaching a decision. If a decision is made to change the scope or direction of a project, the project brief and the project sponsor's terms of appointment must be amended to reflect the change. All changes must be clear, transparent, properly reasoned and recorded. Note that any changes during the detailed design and construction phases of the project are likely to have significant impact on quality and/or cost and/or time; they should be avoided unless absolutely essential.

The senior responsible owner

The senior responsible owner (SRO) should be a senior manager in the business unit that requires the project. This individual is appointed by the IDM and reports directly to them; the SRO is accountable to the IDM for the project and its budget. The SRO should have the status and authority to provide the necessary leadership and must have clear responsibility and accountability for delivering the project requirements in accordance with the approvals given. They should also ensure that sufficient resources are made available to the project sponsor to enable a successful outcome.

The senior responsible owner is responsible for project success. This named individual should be accessible to key stakeholders within the client organisation and, in order to reinforce commitment to the project, should also be visible to the top management of the partnering organisations involved. The IDM should ensure that the SRO has the authority that matches the responsibilities of the role.



The SRO defines the scope of the project, is personally responsible for its delivery and should be accessible to stakeholders. The SRO may be assisted by a project board, to ensure that other stakeholders buy in to the project as early as possible. The project board should not have any powers that cut across the accountability and authority of the SRO. Project boards should be advisory only, addressing strategic issues and major points of difficulty. If a major issue cannot be resolved with the SRO, project board members would have recourse to the IDM. The SRO must form part of a clear reporting line from the top of the office to the project sponsor.

The SRO's responsibilities are:

- to be the design champion for the project, with a personal commitment to delivering a facility that demonstrates design excellence – or to ensure that an appropriate individual takes on the responsibility of design champion
- to oversee the preparation of the business case and budget for the project, ensuring the proposals are realistic and meet the business objectives, and submitting them to the IDM for approval
- to establish an appropriate organisation structure and the necessary communication processes
- to ensure that users and other stakeholders are involved in, and committed to, the project
- to appoint a project sponsor and provide the terms of reference, adequate resources and any necessary support and training
- to ensure that a brief is developed that clearly reflects the project objectives and is agreed by the stakeholders
- to establish a progress and reporting procedure, ensuring that any changes in circumstances affecting the project are evaluated and appropriate action taken
- to resolve issues with members of the client team and other stakeholders
- to approve any essential changes to the scope of the project, ensuring that any impact on quality, cost or time is assessed and reported to top management as appropriate
- to ensure that a post implementation review (also known as post occupancy evaluation) is carried out and considered by all stakeholders in the project.
- to ensure that the finished asset still supports and satisfies the business objectives
- to ensure that the business accepts and benefits from the finished asset.

The SRO should draw up the terms of appointment for the project sponsor, setting out the following:

- the business needs to be addressed by the project
- the resources available to the project sponsor, internally and externally
- the authority delegated to the project sponsor for decision-making
- the project sponsor's responsibilities in relation to health and safety regulations (see *AE10: Health and safety*).

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The SRO should ensure that the terms of appointment are amended promptly in line with any decisions taken by the IDM.

The business case is normally prepared by the project sponsor, with the assistance of independent client advisers or existing integrated supply team as required. It is the SRO's responsibility to ensure that the business case is reviewed and that:

- the recommended option meets the user needs while providing best value for money
- all of the viable options have been properly evaluated
- appropriate advice has been sought from suppliers and/or advisers
- risks associated with each option are clearly identified, together with their impact on the project in terms of performance, cost and time.

The SRO should be committed to encouraging good teamworking practices within the client organisation and with other organisations involved with the project, to ensure that the whole project team really is integrated – client and supply teams working together as an integrated project team. In particular, the SRO should give clear, decisive backing where the client enters into partnering or teamworking arrangements with the integrated supply team (consultants, constructors and specialist suppliers) during the life of the project. Such visible backing would include attendance at the inaugural partnering workshop and commitment to the partnering agreement.

The SRO should attend project reviews with senior managers from the other parties involved in that stage of the project. These reviews should be conducted at regular intervals, appropriate to the stage and nature of the project, to consider major issues, identify achievements and enable potential disputes to be resolved promptly. The SRO is responsible for ensuring that post implementation review is undertaken, to check that the expected business benefits have been achieved; this review is an essential input to Gate 5, which provides independent scrutiny of whether the outcome is as expected.

The project sponsor

The project sponsor is the client's representative, acting as a single focal point for day-to-day management of the client's interest in a project, securing its development and delivery and leading its post implementation review. Project sponsors should fully understand the client's business but do not have to be construction experts; they are advised by the project manager (who must have construction expertise), independent client advisers or specialist members of the supplier team as required. They should always report to the SRO, have formal terms of appointment, empowerment to take decisions and clearly defined delegations with resources provided to ensure that they can direct the project effectively. The core requirements of each sponsor's role should be determined before appointment; the sponsor should stay in post until the project is completed. Note that some project sponsors may have responsibility for a number of projects at one time.



A project sponsor should understand risk and how it is managed, together with the principles of brief-writing and project management techniques. Training should complement practical experience of the industry including teamworking and collaborative working.

The principal tasks of the project sponsor are to manage the client's interests and to represent those to the supply members of the integrated project team. There should be no automatic requirement to appoint an external or in-house project manager to manage the suppliers; depending on the individual and the circumstances (including resource availability), this role could be filled by a suitably qualified and experienced project sponsor with the right support or delegated to a suitable member of the integrated project team.

The project sponsor must be able to articulate the client needs. This requires an understanding of the culture and business of the client's organisation. Project sponsors also need access to a good understanding of the construction industry and the way it works.

The project sponsor has personal responsibility to the SRO for the whole of the project and should expect to stay with the project until its completion. Continuity is an essential feature of this role.

The tasks are to:

- support the SRO
 - preparing business case and investment appraisals and updating as required
 - ensuring that Gateway reviews are undertaken
 - managing the resources allocated by the SRO
 - working within delegated authorities including health and safety
- manage the department's interests in the project by:
 - coordinating and directing user input
 - appraising options (with assistance from independent client advisers, as appropriate, and the project manager) and submitting them to the SRO for approval
 - preparing the project brief for the project manager, making the role of design clear in setting the brief and achieving the goals of the project
 - controlling changes (if required) following approval, ensuring that change control procedures are adhered to
 - ensuring appropriate risk management on the project
 - managing the project budget, including the risk allowance

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- secure professional services for delivery of the project by:
 - appointing the integrated supply team (see *AE5: The integrated project team*)
 - coordinating and fostering teamwork
- ensure effective delivery of the project by:
 - determining the procurement route (see *AE6: Procurement and contract strategies*)
 - producing the project execution plan, including the risk management plan, in collaboration with the project manager
 - ensuring the project is managed in accordance with the project execution plan
 - establishing formal reporting arrangements on project progress
 - providing a focal point for all client contact with the supply team, providing approvals and decisions as necessary
- carry out a post project review with the integrated project team
- ensure effective feedback from the project by assisting the SRO in carrying out a post implementation review to inform the IDM and SRO of:
 - how far the project met the department's interests and objectives
 - what lessons need to be learned for the future (things done well and areas that need to improve).

There is no single set of skills and responsibilities for project sponsors, because some will undertake only one project in their entire career whereas others will be involved in a succession of projects. However, there is a common core set of skills that typically apply to a project sponsor. It is unlikely that one individual will possess all these skills; independent client advice should be obtained to provide support where there are gaps.

A project sponsor should have understanding of:

- the department's business, objectives, culture and financial regime
- the functional activity that the project is to support
- the role of design in setting the brief and achieving the goals
- the impact of different procurement routes
- risk analysis and risk management
- value management and value engineering
- health and safety issues relating to construction projects
- sustainability issues
- the design and construction processes
- the tendering process and forms of contract



- project management techniques
- project review, including Gateway reviews
- team working and partnering
- performance measurement and benchmarking
- whole life costing and cost management.

The project sponsor should have interpersonal skills that include decisiveness and the ability to challenge, communicate, motivate and negotiate effectively, together with:

- the ability to prepare an investment appraisal, with support from independent client advisers if required
- the ability to write a project brief.

The project sponsor ensures that the users have the opportunity to provide relevant input to the design process. While the SRO can deliver the senior stakeholders' views, it is unlikely that they will represent the everyday requirements of end-users, such as patients attending a hospital. The users may find it difficult to articulate their needs in output terms but their perception of what makes a successful facility is an essential contribution to the design.

Independent client advisers

Where the project sponsor is not a technical expert and such expertise is not available in-house, external advisers should be consulted at the earliest opportunity, before Gate 0, to determine whether or not a construction solution will best meet the client's needs. Independent client advisers should be experienced professionals, with substantial business and/or technical expertise in construction, property, procurement or other relevant fields, who will assist the project sponsor. Access to independent client advisers is especially useful before the appointment of the project manager and thereafter to give expert advice on particular issues. However, advisers should not be used routinely to check every aspect of the project manager's work.

As the project progresses, different competencies may be required and different individuals may act in the capacity of independent client adviser throughout the life of the project (examples of disciplines that may be required include legal, financial and technical advice). Independent client advice must be independent of the supply team, to avoid any conflicts of interest.

The project manager and relationship with project sponsor

The project manager is the named individual (often from the private sector) responsible for the day-to-day detailed management of the project and who provides the interface between the project sponsor and the supplier members of the project team. Good project management is essential to the success of the project. (See also *AE5: The integrated project team.*)

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For most projects an external project manager would be appointed; however, there may be exceptions. In local government, for example, it is usual for the project manager to be a member of the in-house team. However, the project may not need a project manager in addition to the project sponsor. Depending on the individual and the circumstances, the project could be managed by a suitably competent sponsor with the right support, but only those sponsors who are construction professionals, with abilities and experience appropriate to the project and sufficient time available, should take on the project management role.

Where a project manager is appointed, the role of the project sponsor should be to:

- define the scope and boundaries of the project
- manage the project manager's performance of delegated responsibilities
- define the criteria for control and management of the project
- monitor the implementation by the project manager of control and management systems
- assist the project manager in the resolution of problems
- act as the department's main point of contact with the project manager
- ensure that the project manager receives departmental decisions on time
- receive and review detailed reports on the project from the project manager
- establish with the project manager a common approach to major issues that arise
- maintain at all times an overview of the project status in relation to the established objectives.

Where a project manager is not appointed, the project sponsor should retain the responsibilities that would normally be delegated to the project manager (see Annex C via electronic link for more details).

Client capability

The management and technical abilities required at each level of the client organisation are identified in Figures 5 and 6 (excluding the abilities required of an investment decision-maker, which are generic in nature). The required management abilities are similar for the three levels of SRO, project sponsor and project manager (see the Successful Delivery Skills Programme in the OGC Successful Delivery Toolkit at www.ogc.gov.uk/sdtoolkit/reference/skills/skills.html).

Identifying the management and technical requirements

OGC is consulting with departments and the industry on training to reflect new ways of working. While this is under development (see Figure 5), a management ability matrix should be used to highlight areas where further management training is necessary. Such management training is available either within departmental training programmes, the Successful Delivery Skills Programme, the Civil Service College or the private sector.



Figure 6 is a technical ability matrix that lists the technical requirements under subject headings. Each subject heading is identified on the accompanying model syllabus (electronic copy only) with the subject aims and knowledge to be taught.

5 Management ability

Attribute	Senior responsible owner		Project sponsor		Project manager	
	Desirable	Essential	Desirable	Essential	Desirable	Essential
Decisiveness		■		■		■
Be challenging		■		■		■
Communication (inc giving feedback)		■		■		■
Motivation		■		■		■
Teambuilding	■			■		■
Facilitation	■		■			■
Interviewing		■		■		■
Negotiation skills		■		■		■
Assertiveness		■		■		■
Objective setting		■		■		■

Annex A (via electronic link) describes each of these attributes in detail.

These matrices are used to consider people against an agreed standard and to identify the training needed to meet any skills gaps by:

- assessing the individual skills and knowledge of project sponsors (both new and existing staff) against the maturity matrices. These will help identify any skill gaps in management ability and technical ability
- identifying the posts that require project sponsor skills, and consider each post against the following options:
 - new or existing post holders to possess the required skills or undertake to be trained to acquire them
 - skills to be acquired within 12-18 months of starting the job
 - the development of trainees through the training/development programme to be reviewed by senior staff as part of staff appraisal, reporting and objectives setting.

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Training for the technical requirement against the model syllabus may be provided by OGC's Successful Delivery Skills Programme (certificate of competence in construction project sponsorship) or other suitably qualified external trainers, provided they meet the model syllabus requirement.

The following definitions apply when using the maturity matrices below:

- understanding: able to understand the key issues of each subject heading and their implications for the client department and able to ask sensible questions on the subject
- competence: have the technical ability to do what is required at each stage of the project or able to direct someone to carry out the detailed requirement.

6 Technical ability

Subject	Senior responsible owner		Project sponsor		Project manager	
	Under-standing	Competence	Under-standing	Competence	Under-standing	Competence
Task 1. Manage department's interests:						
Business strategy knowledge		■		■	■	
Business case investment appraisal		■		■		■
Procurement strategies		■		■		■
Risk management	■			■		■
Writing a project brief	■			■		■
Knowing the construction industry	■		■			■



Subject	Senior responsible owner		Project sponsor		Project manager	
	Under- standing	Competence	Under- standing	Competence	Under- standing	Competence
Whole-life value for money	■			■		■
Value management	■		■			■
Whole-life costing	■		■			■
EC Directives	■			■		■
CDM Regulations/ Health and safety requirements	■			■		■
Design quality	■		■			■
Sustainability issues	■		■			■
Task 2. Procure professional services:						
Contract strategies	■			■		■
Tender and tender evaluation	■			■		■
Forms of contract – types	■			■		■
Forms of contract – terms and conditions	■		■			■
Partnering		■		■		■
Task 3. Ensure effective delivery of project						
Specification	■			■		■
Project execution plan	■			■		■
Construction process	■		■			■

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Subject	Senior responsible owner		Project sponsor		Project manager	
	Under-standing	Competence	Under-standing	Competence	Under-standing	Competence
Energy management/ environmental issues	■		■			■
Design – understanding the design process	■		■			■
Programming/ project planning	■		■			■
Space management	■		■			■
Alternative Dispute Resolution/claims	■		■			■
Performance measurement	■			■		■
Cost management	■			■		■
Change management	■			■		■
Task 4. Ensure effective feedback from project						
Project evaluation - pre-project	■		■		■	
- in project	■		■			■
- post-project		■		■		■



Annexes

Annex A provides details of the management attributes described in Figures 5 and 6. Annex B provides details of the topics summarised above, as the basis for training syllabuses. For advice on assessing project sponsor requirements for specific projects, see Annex C.

In the interests of sustainability and optimising the length of this briefing, Annexes A, B and C are provided as separate documents via an electronic link only. If you do not have access to the Internet, please contact OGC to obtain a copy.

Further information

OGC's Successful Delivery Toolkit provides practical advice and guidance on all aspects of the project delivery lifecycle. It is available on the OGC website at www.ogc.gov.uk/sdtoolkit and on CD-ROM – call the OGC Service Desk for a copy.

The toolkit includes references to external sources of help and information, such as the NAO and HM Treasury.

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