

MANAGE PROJECT INCEPTION PHASE

UNIT CODE: BUS/OS/PM/CR/01/5/A

UNIT DESCRIPTION

This unit covers the competencies required to manage project inception phase. It involves performing situation analysis, developing concept note, developing business case, carrying out feasibility study, developing benefits management plan, preparing project proposal, seeking project approval and disseminate project approval report to relevant stakeholders, documenting source selection criteria and preparing project acceptance and closure criteria.

ELEMENTS AND PERFORMANCE CRITERIA

ELEMENT	PERFORMANCE CRITERIA
These describe the key outcomes which make up workplace function	These are assessable statements which specify the required level of performance for each of the elements. <i>Bold and italicized terms are elaborated in the Range</i>
1.Perform situation analysis	1.1 Information related to the problem statement is gathered as per customer/client requirements 1.2 Stakeholders relevant to the problem statement identified and target group is selected as per information needs 1.3 Problem analysis is done as per gathered information 1.4 Perform objectives analysis as per organisational strategic plan 1.5 Alternatives analysis is done as per organisations standard operating procedures 1.6 Stakeholders (target group) feedback is analysed and recommendations made on the project idea
2. Develop concept note	2.1 Project context and rationale are stated as per the organisation's strategic objectives 2.2 Project goals and objectives are enlisted as per organisational strategic objectives 2.3 High level project cost is estimated as per gathered information 2.4 project benefits are listed as per objectives analysis performed
3. Develop business case	3.1 Identify the business problem is identified as per the problem analysis 3.2 Identify alternative solutions are identified as per

	<p>Alternative analysis</p> <p>3.3 Cost benefit analysis is carried out as per the project objectives</p> <p>3.4 Preferred solution is recommended as per alternatives analysis</p> <p>3.5 Implementation approach is described as per the gathered information</p>
4. Carry out feasibility study	<p>4.1 Various types of <i>feasibility study</i> are identified as per gathered information</p> <p>4.2 Tools and participants for the feasibility study are selected as per gathered information</p> <p>4.3 Data is collected, analysed and documented as per customer/client requirement</p> <p>4.4 Make a no/no go decision based on the analysed data</p>
5. Develop Benefits Management plan	<p>5.1 Benefits analysis and planning is performed as per business case</p> <p>5.2 Meaningful metrics and KPIS are developed to measure actual delivery of benefits as per business case</p> <p>5.3 Roles and responsibilities are defined as per organisation operating procedures</p> <p>5.4 Benefits sustainment plan is developed as per organisational strategic objectives</p>
6. Prepare project proposal	<p>6.1 Financing needs are determined based on the project plan</p> <p>6.2 Itemized budget is prepared based on the financing needs</p> <p>6.3 Possible donors are identified based on their funding priorities and requirements</p> <p>6.4 Project proposal is prepared as per the donor requirements</p>
7. Seek project approval and disseminate project approval report to relevant stakeholders	<p>7.1 Project is approved by Sponsor as per organisational operating procedures</p> <p>7.2 Key stakeholders are notified of the approved project as per organisational operating procedures</p> <p>7.3 Project charter is developed as per organisational policies and procedures</p> <p>7.4 Project manager is appointed to lead the project to successful delivery as per project objectives</p> <p>7.5 Determine project phases and development approach as per project objectives</p>
8. Prepare supplier	<p>8.1 Project needs are documented as per project</p>

selection criteria	<p>requirements</p> <p>8.2 supplier prequalification is done as per project requirements and organisation operating procedures</p> <p>8.3 Potential supplier database is listed as per supplier prequalification</p>
9. Prepare Project Acceptance and Closure criteria	<p>9.1 Test parameters and acceptance criteria is developed as per Project objectives and stakeholder requirements</p> <p>9.2 Project/Phase Closure guidelines is developed as per project objectives</p> <p>9.3 Premature project closure guidelines are developed as per project objectives and existing contractual obligations</p> <p>9.4 Dispute resolution guidelines are developed as per existing dispute resolution mechanisms (law of the land)</p> <p>9.5 Checklist for project closure is developed as per stakeholder requirement</p>

RANGE

This section provides work environment and conditions to which the performance criteria apply. It allows for different work environment and situations that will affect performance.

Variable	Range
1. Feasibility study may include but not limited to:	<ul style="list-style-type: none"> • Economical • Financial • Technical • Social • Ecological • Political
2. Tools may include but not limited to:	<ul style="list-style-type: none"> • Interviews • Questionnaires • Observations • Focus group discussions • Project selection and appraisal techniques

REQUIRED SKILLS AND KNOWLEDGE

This section describes the skills and knowledge required for this unit of competency.

Required Skills

The individual needs to demonstrate the following skills:

- Communication
- Networking
- Interpersonal
- Managerial
- Reporting
- Presentation
- Analytical
- Time management
- Data computation
- Leadership

Required Knowledge

The individual needs to demonstrate knowledge of:

- Basic ICT
- Concept notes
- Types of feasibility study
- Development and application of tools
- Data collection and analysis
- Report writing and presentation
- Planning and organising meetings with stakeholders
- Social diversity and Team work

EVIDENCE GUIDE

This provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge and range.

1. Critical aspects of Competency	Assessment requires evidence that the candidate: 1.1 Identified project idea 1.2 Developed a concept note 1.3 Developed and applied feasibility study tools 1.4 Carried out feasibility study 1.5 Analysed and reported on feasibility study findings
2. Resource Implications	2.1 Assessment Venue 2.2 Computers 2.3 Stationery

	<p>2.4 Means of transport</p> <p>2.5 Telecommunication equipment</p> <p>2.6 Personal protective equipment</p> <p>2.7 Relevant authorizations</p>
3. Methods of Assessment	<p>Competency in this unit may be assessed through:</p> <p>3.1 Interview</p> <p>3.2 Written tests</p> <p>3.3 Third party report</p>
4. Context of Assessment	<p>Competency may be assessed:</p> <p>4.1 On-the-job</p> <p>4.2 Off-the –job</p> <p>4.3 During Industrial attachment</p>
5. Guidance information for assessment	<p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended.</p>

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