

Keeping to the brief

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Ewan Craig, a speaker at the RICS annual 'It's Your APC' conference, talks about the competency of development/project briefs

Development or project briefs is one of the optional competencies of the building surveying Assessment of Professional Competence (APC). Preparing development/project briefs demands a good ability to apply mandatory and technical competencies, for example:

- client care: to collect data, analyse and define the needs of clients to develop the brief;
- legal/regulatory compliance: awareness of planning legislation and Building Regulations.

The levels

At level 1

Demonstrate knowledge of the techniques used for cost, quality and time-related forensic examinations in your area of practice.

At level 2

Apply your knowledge of cost, quality and time-related examinations in your area of practice.

At level 3

Provide evidence of reasoned advice and report to clients on cost, quality and time-related examinations in your area of practice.

The project brief is the key reference document as a scheme develops. You should be familiar with these key documents, for example how it was prepared and developed, so you are ready to address questions and aspects related to them from your submission documents.

Questions

Actual questions are based on the candidate's experience, which should be at level 2 but could exceed this. Two examples are given below.

Could you please explain how the criteria for success in the project brief were arrived at in project X?

This is aimed at level 2, but could be extended to level 3, say if you gave reasoned advice on the criteria for success in a report to the client. The answer would explain pertinent issues to support your application of knowledge.

I was reassigned to a new client account team in firm Y; this was my first project with them. I was conscious that I would need to familiarise myself with their business needs and objectives for the project because these would identify the overall requirements for the project and direct me on the issues that matter to the company. I find it is critical to appreciate that a project is there to further my client's business so their needs must be met.

The client also had other related projects. It was important that these were considered, because at an operational level the projects needed to allow business continuity and would demand similar resources such as in-house staff and management.

I discussed the business needs and objectives, together with its impact on related projects, for the project with the project sponsor in the client organisation and my manager. These focused on a set time window when the works could be carried out, budget costs and resources, phasing with other projects and levels of quality in the client's guidelines. I prepared a set of critical success factors which would meet the business objectives for the project, that I confirmed with the project sponsor. This proved useful because feedback highlighted that part of the facility had to be handed over early. I revised the critical success factors and incorporated these in the project brief.

Would you please explain how you derived a list of risks for project Z and why consideration was at the project brief stage?

This is aimed at level 2. The answer would show the issues that were considered in applying your knowledge. It is important to establish any known project risks because threats can then be managed through mitigation or elimination, and opportunities realised. Failure to do so could result in greater uncertainty in the successful project outcome.

I followed my practice's methodology to risk management. The client's appetite for risk was known and because the matter is subjective I checked the list with my manager, who was more familiar with the client, before sending it to the project sponsor. The risks were based on the project criteria and what could affect those that may vary or was unknown. This included costs such as market fluctuations, delays in gaining consents, and quality, such as a contractor's failure to meet the client's guidelines.

Care

Given the time constraints, your answer should give a brief but whole response. Care should be taken to demonstrate your own skills, abilities and knowledge to the assessors.

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Further information

- Details on the [APC pathway guide for building surveyors](#)
- Related competencies include [Client care](#) , [Construction technology and environmental services](#) , [Legal/regulatory compliance](#) , [Design and specification](#)
- This feature is taken from the RICS *Building surveying journal* (May/June 2015)