Competence Framework for Project Managers in the Built Environment in England

Working Group 10 – Project Managers

in partnership with

Because when projects
succeed, society benefits

Foreword

Publishing information

This Competence Framework was developed by Working Group 10 (Project Managers) of the Competence Steering Group (CSG) established by the Industry Response Group (IRG). It came into effect in January 2024.

Acknowledgement is given to the following organisations who contributed to the development of this Framework

1. Association for Project Management, The Chartered Body for the project profession (APM)

2. Chartered Institute of Building (CIOB)

3. Royal Institution of Chartered Surveyors (RICS)

4. Royal Institution of British Architects (RIBA)

5. Institute of Workplace and Facilities Management (IWFM)

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Relationship with other publications

This Framework is intended to be complimentary to the suite of documents published by the British Standards Institution (BSI) comprising:

1. BSI Flex 8670, Built environment – Core criteria for building safety in competence frameworks – Code of Practice

2. PAS 8671, Built environment – Framework for competence of Individual Principal Designers – Specification

3. PAS 8672, Built environment – Framework for competence of Individual Principal Contractors – Specification

4. PAS 8673, Built environment – Competence requirements for the management of safety in residential buildings – Specification

This Framework has been informed by:

1. APM Competence Framework

2. APM Chartered Project Professional Standard

3. CIOB Chartered Membership

4. CIOB Code of Practice for Project Management in the Built Environment 6th edition

5. RICS Project Management Pathway (Chartered)

Information about this document

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Use of this document

It has been assumed in the preparation of this Framework that the execution of its provisions will be entrusted to appropriately qualified and experienced people, for whose use it has been produced. There is also an anticipation that this Framework will be useful to:

- building contractors, sub-contractors and suppliers
- professional bodies serving project and building management disciplines
- building trade bodies, associations and federations
- government agencies
- procurement organisations
- awarding organisations
- other accreditation bodies

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Compliance with this Framework and legal obligations

Compliance with this Framework cannot confer immunity from legal obligations. It is the responsibility of the project manager to keep up to date with legislation and legal obligations.

Contents

Introduction

This Framework has been developed by an industry consensus group to establish core competence criteria for project managers working in the built environment. Project managers are those individuals who have overall responsibility for planning, monitoring and controlling the delivery of a built environment project making sure the time, cost, quality and specifications of the project are met.

The project manager may appoint the Principal Contractor and/or Principal Designer and is required to work with these roles for the overall benefit of the project. In order to do so the project manager must understand the roles and legal obligations of the Principal Contractor and Principal Designer. The project manager must ensure that the client accepts their legal responsibilities before commencing work.

Project managers are not in a duty holder role and their aim is to support those who have legal responsibilities as duty holders under the *Building Safety Act 2022*.

The objective of this Framework is to support improvement in industry competence as recommended in Dame Judith Hackitt's Independent Review of Building Regulations and Fire Safety following the Grenfell Tower Fire of 14 June 2017. Improvements in the competence of these individuals will support better compliance with building regulations and in particular ensuring that buildings are safe throughout their lifecycle.

The Building Safety Act 2022

The *Building Safety Act 2022* received Royal Assent in April 2022 and aims to implement a new regulatory framework for building safety, and for compliance with all aspects of the Building Regulations including both technical and procedural requirements. This includes setting new duty holding requirements for people acting in key roles. The Act imposes new legal duties and sanctions on persons undertaking building work. It also imposes additional requirements for the construction, maintenance and operation of higher risk buildings (HRBs).

Higher risk buildings (HRBs)

The Higher-Risk Building Regulations define an HRB during design and construction as "a building that is at least 18m in height or has at least 7 storeys and contains at least two residential units; or is a care home; or is a hospital". This definition may be amended over time.

Duty holding requirements in the Building Regulations

The *Building Safety Act 2022* establishes a new regime for duty holding responsibilities placing specific responsibilities on a range of persons and organisations involved in the construction, operation and maintenance of buildings. For all types of building work new duties are imposed on clients, designers, contractors, principal designers and principal contractors by extending the existing duty holding model of the Construction Design and Management (CDM) Regulations 2015. Additional duties and requirements are imposed where these duty holders work on HRBs. Project managers need to understand the relationship between the duty holders and how to work effectively and collaboratively to support them in meeting those duties. Anyone acting as a project manager also needs to understand how their activities and responsibilities relate to compliance with relevant requirements set out in the Building Act 1984 (as amended) and the *Building Safety Act*.

Competence thresholds

This Framework sets out two competence thresholds, one for those working on complex projects, for example those that have a high level of risk, uncertainty, interdependent stakeholders and a fast pace of change and one for those working on Higher-risk buildings (HRBs).

There are many projects that take place in the built environment that do not fit into either the category of complex projects or HRBs. For these projects, this Framework should be used as guidance and the following qualifications and memberships would prove useful in supporting knowledge, understanding and career development in project management. Please note that not all competences in the Framework are covered in the recommendations below and these are suggested as supportive options rather than necessarily demonstrating competence.

APM

- APM Project Management Qualification – a generic project management qualifications that provides the underpinning knowledge and understanding to help manage projects
- APM Associate Membership
- APM Full Membership
- APM Chartered Project Professional

CIOB

- CIOB Technical membership
- CIOB Full membership
- CIOB Chartered Fellowship
- Construction Project Management Course: Construction Project Management: Doing It Right - CIOB (ciobacademy.org)
- Project Management Historical and Traditional Buildings Project Management and Supervision: Historic and Traditional Buildings (ciobacademy.org)

RICS

- RICS Associate qualification – project management pathway
- RICS Chartered qualification – project management pathway

Where possible, work should be supervised by someone who has demonstrated the competence thresholds in this Framework.

1. Scope

Project managers oversee the planning and delivery of built environment projects. They ensure that work is completed on time and within budget, to quality parameters and agreed specifications. They organise logistics, delegate work and keep track of spending and manage/engage with stakeholders. This Framework sets out the competence requirements for persons acting as project managers.

This Framework describes specific competences common to all project managers, including consultant project managers, construction project managers as well as those in local authority services, working on projects in the built environment and additional experience requirements for those working on higher risk buildings (HRBs). This Framework is intended for use by:

- professional institutions, regulators, enforcing authorities, licensing bodies and awarding organizations to assess the competence of the project managers;
- individuals to determine their own competence limitations and to identify areas of development; and
- construction organisations undertaking new build, refurbishments, repairs, maintenance and improvements (RMI) to buildings, in identifying individuals competent to undertake the role of site supervisor.

It is expected that existing professional vocational, education and technical training will take into account the competence requirements of this Framework when designing or reviewing education and training syllabuses.

This Framework does not cover:

- the requirements related to individuals under the CDM Regulations 2015
- specific education and training requirements

2. Normative references

The following documents are referred to in the text in such a way that some or all of their content constitutes provisions of this Framework. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

- The *Building Act 1984*
- The Building Regulations (as amended)
- The Building (Appointment of Persons, Industry competence and Duty Holders) (England) Regulations 2022
- The *Building Safety Act 2022*

3. Terms, definitions and abbreviations

3.1. Terms and definitions

For the purposes of this document, the terms and definitions given in BSI Flex 8670 apply.

Stakeholders – those who are impacted by or impact the project, for those working in contracting organisations, this will include sub-contractors

3.2. Abbreviated terms

For the purposes of this document, the following abbreviations apply.

CDM   Construction (Design and Management) Regulations 2015

CPD   continuing professional development

HRB   higher risk building

4. Roles, responsibilities and competences

4.1. Roles and responsibilities

For the projects they are managing, the project manager shall be responsible for:

a) Understanding the requirements of building regulations and other relevant legislation to plan and manage the construction project, including relevant duty holder roles and also ensures the client knows, understands and accepts their responsibilities.

b) Managing the project, in conjunction with relevant stakeholders, to allow sufficient time to deliver a technically compliant and safe building, including the surrounding environment, for the occupants.

c) Managing stakeholders, including the welfare and wellbeing of workers involved in the project, and those impacted by the project including occupants (including decanting on refurbishments projects, as applicable).

d) Taking all reasonable steps to be satisfied that all those working on the project are competent to do so.

e) Using reliable and nationally recognised sources of industry information and standards in decision making.

f) Recognising the limit of their own competence and of those under their control.

g) Determining when to engage with experts holding specialist skills, knowledge, experience and behaviours.

The project manager shall develop their knowledge, skills, experience and appropriate behaviours in accordance with this Framework in order to support and advance the culture of whole life safety.

4.2. Skills, knowledge and experience

The project manager shall meet the competence requirements set out in Clauses 4, 5 and 6 with respect to skills, knowledge, experience and behaviours.

To ensure the project manager is competent in managing the scope, complexity and risk profile specific to HRBs, the project manager needs to demonstrate at least 12 months experience of managing project(s) in an HRB environment; this experience could be supervised . At least 50% of the competences need to be demonstrated in an HRB environment.

To ensure the project manager is competent in managing the scope, complexity and risk profile specific to complex projects, the project manager needs to demonstrate at least 12 months experience of managing project(s) in a complex project environment; this experience could be supervised . At least 50% of the competences need to be demonstrated in a complex environment.

The project manager shall maintain competence through a commitment to CPD and recertification every five years.

4.3. Behaviour and ethics

Any person acting as a project manager shall:

a) Act ethically and behave in a way that contributes to safe outcomes.

    i) Demonstrate ethical principles to promote safe outcomes, including: respect for life, the law, environment and public good

    ii) Apply sound judgement including anticipating, identifying, analysing and solving problems to support safe and effective outcomes

    iii) Comply with any relevant codes or standards of conduct

    iv) Demonstrate commitment to a strong safety culture

    v) Understand the duty of care owed to residents, occupants, co-workers, first responders and people in and around buildings

b) Demonstrate personal and collective responsibility and accountability.

    i) Understand and take responsibility for their own actions

    ii) Challenge inappropriate or unsafe behaviours and escalate concerns

    iii) Contribute to developing and maintaining a strong safety culture

c) Manage their own competence.

    i) Act within the limits of their own competence at all times. The project manager shall be able to recognise and evaluate their own competence limitations and seek appropriate assistance where and when necessary

    ii) Manage, maintain and develop their competence through relevant continuous professional development

    iii) retain records of continuous professional development activities

5. Minimum competences

The project manager shall be able to meet the functions and their specific competences as defined in 5.1 – 5.18 below.

5.1. Legal and contractual requirements in relation to the discharge of all their duties

The project manager shall be able to:

a) Understand, in relation to the discharge of their duties, applicable legislation.

b) Recognise their consequent legal duties and obligations in regard to building and life safety.

5.2. Motivate and lead people to deliver successful projects

The project manager shall be able to:

a) Create a clear understanding of the vision for the construction project.

b) Demonstrate commitment at all levels to a strong safety culture.

c) Employ relevant leadership styles to ensure the delivery of the construction project.

5.3. Identify, analyse and engage with stakeholders effectively

The project manager shall be able to:

a) Understand and appreciate stakeholder requirements and levels of influence, including residents in occupied buildings.

b) Prepare stakeholder plans relevant to the complexity of the project.

c) Monitor the effectiveness of stakeholder plans and adapt and update if necessary.

5.4. Communicate with stakeholders effectively

The project manager shall be able to:

a) Communicate effectively within and between teams, organizations and individuals.

b) Listen and feed back effectively.

c) Communicate technical information to non-technical audiences.

d) Communicate through use of oral, written, drawn, digital or graphic information and in accessible formats.

e) Monitor effectiveness of communications and adapt where necessary.

5.5. Develop and manage teams

The project manager shall be able to:

a) Create and/or develop a team to meet the requirements of the project.

b) Assess competence of others when making appointments or allocating tasks within teams and identify and address any gaps within the project team.

c) Collaborate with others working respectfully and promoting respect throughout the project team, including sub-contracted organisations.

5.6. Recognise, manage and resolve disputes and differences between individuals/groups

The project manager shall be able to:

a) Recognise situations that may lead to conflict.

b) Explore and consider different views in relation to the conflict.

c) Employ relevant dispute resolution techniques to resolve conflicts and disputes.

5.7. Identify, select and commission resources required for the project

The project manager shall be able to:

a) Advise on the selection of the appropriate procurement strategy for the project.

b) Manage the scope and definition of roles, responsibilities and communications

c) Make sure supply chain(s) clearly understands clients needs and the business case.

d) Manage the tendering and negotiation process, ensuring the process is fair and in line with relevant legislation.

e) Advise on the selection of appropriate forms of contract and warranties for the chosen procurement route, demonstrating an understanding of requirements for insurance, warranty or other protections, including those enabling routes of recourse to address building safety defects.

f) Contribute to safe practice in procurement and operational management activities, including pricing, purchasing and contracting so as to prevent building safety outcomes and performance being compromised by decisions about cost .

5.8. Identify, monitor and respond to health and safety risks, including those highlighted in the building safety case

The project manager shall be able to:

a) Ensure consideration is given to health and safety risks in both the pre-construction and construction phases (for design, buildability, maintenance and future use) from a project perspective.

b) Act in a way that protects safety of self, colleagues and the public whilst undertaking work.

c) Coordinate building design, or construction activities to ensure holistic building safety in conjunction with duty holders.

d) Effectively communicate issues relating to risk or safety with occupants including, where appropriate, residents, clients and members of project or management teams.

5.9. Manage performance through contractual arrangements

The project manager shall be able to:

a) Manage the implementation of agreed contracts.

b) Understand contractual rights and contractual obligations.

c) Manage contractual disputes, bringing in specialist advice where necessary.

d) Understand and manage the process for contractual changes, ensuring effective change control.

5.10. Produce and manage a schedule

The project manager shall be able to:

a) Utilise a relevant approach to scheduling based on the project approach allowing sufficient time to deliver a technically compliant and safe building, including the surrounding environment for the occupants.

b) Ensure consistent understanding of the tasks to be completed and estimates for completion.

c) Understand and manage any critical dates and milestones

d) Consider and manage dependencies between activities.

e) Incorporate relevant review points.

f) Manage performance against the schedule taking corrective actions required.

5.11. Plan and use resources effectively

The project manager shall be able to:

a) Ascertain resource needs and requirements, including types and quantity of resources.

b) Schedule resource use, including logistics of delivery, distribution and storage.

c) Manage the availability of resources, resolving any issues relating to time constraints and/or availability of resource.

d) Monitor and manage resource usage throughout the project, including identifying and managing any changes needed.

5.12. Manage, monitor and report on costs against budget

The project manager shall be able to:

a) Establish and agree the project budget.

b) Manage project costs against budget, including updating allocations where necessary.

c) Produce reports for stakeholders , based on the monitoring of financial performance.

d) Provide effective forecasting of costs, risks and their financial implications.

5.13. Identify, analyse, plan and implement responses to project risks

The project manager shall be able to:

a) Identify, analyse, plan and respond to risks throughout the project life cycle, including building safety risks to help achieve compliance with relevant building regulations.

b) Manage secondary and residual risks.

c) Clarify ownership of risk through contractual arrangements.

d) Ensure unresolved risks are transferred, accepted or avoided at the end of the project.

5.14. Establish the governance frameworks to meet the requirements of the project

The project manager shall be able to:

a) Establish the framework for authority and accountability within the project including reporting requirements and decision making processes.

b) Reflect governance frameworks in relevant contracts, ensuring responsibilities and accountabilities are understood and accepted.

c) Ensure alignment between project and organisational governance.

5.15. Identify, deliver and manage the scope of the project

The project manager shall be able to:

a) Produce scope baseline for tracking and managing changes; clearly defining what is in and out of scope.

b) Manage scope through an effective change control process.

c) Validate and gain formal acceptance of the scope at concept, definition, delivery and handover stages of the project.

5.16. Ensure outputs are delivered to the right quality in accordance with requirements throughout the project,

The project manager shall be able to:

a) Understand relevant statutory and legislative requirements, quality requirements of the customer, requirements of quality management systems.

b) Prepare and gain agreement for the quality management plan for the project.

c) Ensure the quality management plan is implemented as agreed.

d) Manage and co-ordinate progress and quality of building works in accordance with requirements and contracts to ensure a safe and compliant building.

5.17. Understand and contribute to information management for the project

The project manager shall be able to:

a) Apply information management principles throughout the project, including the use of relevant digital technology

b) Assemble or evaluate an information management assignment matrix to ensure that all activities within information management are assigned across the project team.

c) Create information management resources to enable information management across the project team, to the extent of the project managers appointment.

d) Create and manage project management information.

e) Manage the process of drawing together information, ensuring all information from concept through to delivery is included (noting some of this information may have been produced prior to project manager appointment). Where appropriate, this needs to meet the requirements of the Golden Thread

f) Understand requirements for exchange of fire safety information.

g) Present information in the format required by the contract to ensure compliance.

5.18. Understand commonly used processes for the design and construction of buildings

The project manager shall be able to:

a) Liaise with specialists in the development of design and construction solutions relevant to the project.

b) Understand and report on the cost implications of different designs for the project.

c) With input from specialists, advise on the choice of construction solution or environmental service solutions for the project.

d) Understand the importance of fire safety design concepts and strategies that enable safe use and occupancy of a building including integration of principles of inclusive design.

5.19. Ensure sustainability is considered during each stage of the project

The project manager shall be able to:

a) Consider the main sustainability impacts that a building has over the duration of its life cycle.

b) Identity and apply appropriate methods to mitigate negative sustainability impacts whilst ensuring safety of the building.

c) Comply with relevant legislation and organisational policies in relation to sustainability.

6. Competence management

6.1. Demonstration of competence

The project manager shall demonstrate they are able to develop and maintain the competences to undertake their duties and appropriately apply individual skills, knowledge, experience and behaviours to the level required dependent on the nature, size and complexity of the building work, including the additional experience requirements attributed to HRBs.

6.2. Legal and professional duties

Project managers shall be able to demonstrate that they have the relevant skills, knowledge, experience and behaviours essential for discharging their legal and professional duties for managing construction projects.

6.3. Project team members' competences

The project manager shall demonstrate they are able to assess the suitability of the relevant project team members' skills, knowledge, experience and behaviours through a robust and rigorous checking process.

7. Competence assessment, development and maintenance

Persons seeking appointment as a project manager shall recognise and accept that assessment of their competence for the role is necessary and that professional bodies exist for this purpose. Details of relevant assessment schemes against this Framework are available from relevant professional bodies including APM, CIOB and RICS, including any prior learning or assessment requirements. The project manager shall maintain competence through a commitment to CPD and be reassessed against this Framework every five years.

We are the only chartered membership organisation for the project profession