

# PROJECT INCEPTION

**UNIT CODE:** BUS/CU/PM/CR/01/5/A

## Relationship to Occupational Standards

This unit addresses the unit of competency: Manage project inception phase

**Duration of Unit:** 100 Hours

## 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.

## Summary of Learning Outcomes

1. Perform situation analysis
2. Develop concept note
3. Develop business case
4. Carry out feasibility study
5. Develop Benefits Management plan
6. Prepare project proposal
7. Seek project approval and disseminate project approval report to relevant stakeholders
8. Document Source Selection criteria
9. Prepare Project Acceptance and Closure criteria

## Learning Outcomes, Content and Methods of Assessment

Learning Outcome	Content	Methods of Assessment
1. Perform situation analysis	<ul style="list-style-type: none"><li>• Importance of situational analysis</li><li>• Methods of situational analysis</li><li>• Process of situational analysis<ul style="list-style-type: none"><li>✓ select stakeholder target</li><li>✓ conduct problem analysis</li><li>✓ identify alternatives</li><li>✓ situation analysis report</li></ul></li></ul>	<ul style="list-style-type: none"><li>• Oral questioning</li><li>• Written tests</li></ul>

2. Develop concept note	<ul style="list-style-type: none"> <li>• Meaning of a concept note</li> <li>• Format of a concept note</li> <li>• Components of a concept note</li> <li>• Development of a concept note</li> <li>• Project research</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> </ul>
3. Develop business case	<ul style="list-style-type: none"> <li>• Statement of the problem</li> <li>• Problem statement analysis</li> <li>• Alternative solutions</li> <li>• Cost benefit analysis</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> <li>• Case study</li> </ul>
4. Carry out feasibility study	<ul style="list-style-type: none"> <li>• The meaning of feasibility study</li> <li>• Importance of feasibility study in project management</li> <li>• Purpose of feasibility study</li> <li>• Selection of scope in feasibility study</li> <li>• Tools of carrying out feasibility study e.g. <ul style="list-style-type: none"> <li>• Questionnaire</li> <li>• Statistics and data analysis</li> </ul> </li> <li>• Methods of carrying out feasibility study e.g. <ul style="list-style-type: none"> <li>• Interviews</li> <li>• Focus group discussion</li> </ul> </li> <li>• Feasibility study report writing</li> </ul>	<ul style="list-style-type: none"> <li>• Direct observation</li> <li>• Oral questioning</li> <li>• Written tests</li> </ul>
5. Develop Benefits Management plan	<ul style="list-style-type: none"> <li>• Project benefits</li> <li>• Benefits owners</li> <li>• Benefit schedule</li> <li>• Benefit sustainability plan</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> </ul>
6. Prepare project proposal	<ul style="list-style-type: none"> <li>• Meaning of project proposal</li> <li>• Components of a project proposal</li> <li>• Format of project proposal</li> <li>• Factors to consider in proposal writing</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> </ul>
7. Seek project approval and disseminate approval report to relevant	<ul style="list-style-type: none"> <li>• Feasibility study report evaluation</li> <li>• Project approval by the relevant stakeholders</li> <li>• Feasibility study report</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> </ul>

stakeholders	dissemination methods e.g. Sending feasibility study analysis	
8. Prepare supplier selection criteria	<ul style="list-style-type: none"> <li>• Supplier prequalification criteria</li> <li>• Process of supplier prequalification</li> <li>• Evaluation of suppliers</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> </ul>
9. Prepare Project Acceptance and Closure criteria	<ul style="list-style-type: none"> <li>• Closure criteria</li> <li>• Acceptance criteria</li> <li>• Process of developing acceptance criteria</li> <li>• Process of developing closure criteria</li> </ul>	<ul style="list-style-type: none"> <li>• Oral questioning</li> <li>• Written tests</li> </ul>

### **Suggested Methods of Instruction**

- Instructor led facilitation of theory
- Demonstration by trainer
- Field work by the trainee
- Field trips
- Viewing of related videos

### **Recommended Resources**

- Sample Questionnaires
- Computers
- Communication devices
- Recorders
- Internet
- Cameras
- Stationery
- Transport means
- Meeting venues