



BSBPMG427

Apply project procurement procedures

Assessment 2 of 5

Project



Assessment Instructions

Task overview

This assessment is divided into two [2] tasks. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- Project Management Policy and Procedures
- Procurement Policy and Procedures.



Assessment Information

Submission

You are entitled to three [3] attempts to complete this assessment satisfactorily. Incomplete assessments will not be marked and will count as one of your three attempts.

All questions must be responded to correctly to be assessed as satisfactory for this assessment.

Answers must be typed into the space provided and submitted electronically via the LMS. Hand-written assessments will not be accepted unless previously arranged with your assessor.

Reasonable adjustment

Students may request a reasonable adjustment for assessment tasks.

Reasonable adjustment usually involves varying:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

Task 1

Case Study

For the purpose of this assessment, you will play the role of Trish Gibbons, Accounts Officer and Project Officer for CBSA.

CBSA is a consultancy service providing assistance with compliance, finances, human resources, information technology, and other business needs to ensure that businesses have the expertise and support they need to survive and prosper.

CBSA is planning two major projects over the next 12 months:

- The first project aims to improve customer service by purchasing a customer service software program. It will be used by all departments of CBSA, allowing information on our clients to be updated in real-time and accessed by all client-facing staff. Information will be securely stored using a cloud-based program.
- The second project is to open an additional office in Melbourne. After growth in client demand, the CBSA board of management has approved the opening of Melbourne to service our national clients and our new clients in Victoria.

Project Objectives

1. Install a new customer service software program that can be used and accessed across all departments within the next three months and provide training to relevant staff on the new system.
2. Expand CBSA business by establishing a new office in Melbourne that can accommodate 15 staff and has parking [for all 15 staff] in the next four months.

You received the following email from Wi Zhang, the Chief Financial Officer for CBSA:

Good morning Trish,

Thank you for providing the answers to the questions.

Your first task involves identifying and assisting with the procurement requirements according to the project objectives.

I have attached a template for you to record your findings to this email. An example in each template is provided for your guidance.

I look forward to your response.

Kind Regards,

Wi Zhang

Chief Finance Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



You need to fill out the two [2] Procurement Requirement Templates provided below based on the project objectives. Procurement Requirement Template

More specifically, you will need to identify two :

- activities, work performed during the course of the project
- tasks, work or activities needed for progress towards the project goals.

For each activity or task, you will need to identify the following:

- required resources
- timeline
- Budget
- Quality requirements
- Task owner

To fill out the templates, you will need to access, read and refer to the following two [2] CBSA Policies and Procedures:

- Project Management Policy and Procedures
- Procurement Policy & Procedures.

[Approximate total word count: 90 - 100 words]

Assessor instructions: Students must fill out the two [2] templates below following the instructions provided. The student must identify the procurement requirements for both projects and refer to the organisation's procurement documents. Students' answers will vary, however their responses:

1. Must identify at least two of the following relevant to project objectives:
 - activities, work performed during the course of the project
 - tasks, work or activity needed for progress towards the project goals
2. Must identify the following:
 - required resources
 - timeline
 - Budget
 - Quality requirements
 - Task owner

Procurement Requirement Template 1

Project Name:	Customer Service Software Purchase and Implementation	Date:	30 June
Project No:	1	Document No:	23
Project Manager:	Wi Zhang, Chief Financial Officer	Project Sponsor:	Gavin Stead CEO

Procurement Activity/Task	Required Resources <i>Including HR, Material, Equipment</i>	Timeline	Budget	Quality Requirements	Task Owner <i>Person responsible for undertaking the task</i>
<i>Develop terms and conditions</i>	<i>IT manager and lawyer</i>	<i>1 week</i>	<i>\$1,200</i>	<i>Detailed terms and conditions with guarantees of installation and timeframes</i>	<i>IT manager</i>
<i>Software user contract</i>	<i>IT manager and lawyer</i>	<i>1 week</i>	<i>\$70</i>	<i>Detailed terms and conditions with guarantees of installation and timeframes</i>	<i>IT manager</i>

Procurement Requirement Template 2

Project Name:	Additional New Offices in Melbourne		Date:	30 June	
Project No:	2		Document No:	24	
Project Manager:	Wi Zhang, Chief Financial Officer		Project Sponsor:	Gavin Stead CEO	
Procurement Activity/Task	Required Resources <i>Including HR, Material, Equipment</i>	Timeline	Budget	Quality Requirements	Task Owner <i>Person responsible for undertaking the task</i>
<i>Lease document</i>	<i>Lawyer</i>	<i>2 weeks</i>	<i>\$1,750</i>	<i>Detailed long-term (min five years) with car parking</i>	<i>Lawyer</i>
<i>Request for office furniture quotations</i>	<i>Project officer</i>	<i>3 weeks</i>	<i>\$650</i>	<i>Quotation to include new furniture for up to 15 staff</i>	<i>Project manager</i>

Task 2

Case study

After Wi received your templates, she sent you the following email:

Good morning Trish,

Thank you for completing the Procurement Requirements Templates I provided you with for the two projects.

Your next task is to develop the Procurement Management Plans based on your procurement requirement findings and on the Project Brief and Objectives previously provided.

In addition to your findings, the Procurement Management Plan requires you to complete a risk assessment for the procurement activities and/or tasks.

In the process of this, please use the attached Risk Rating Matrix.

Remember to include in your plan the name of suppliers and their contact.

Please complete this task using Procurement Management Plan attached and email it to me by close of business next Wednesday.

I look forward to your response.

Kind Regards,

Wi Zhang

Chief Finance Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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Risk Rating Matrix

Risk rating	Risk priority	Description
0	N	No risk: The costs to treat the risk are disproportionately high compared to the negligible consequences.
1-3	L	Low risk: This may require consideration in any future changes to the work area or processes or can be fixed immediately.
4-6	M	Moderate: This may require corrective action through the planning and budgeting process.
8-12	H	High: Requires immediate corrective action.
15-25	E	Extreme: Requires immediate prohibition of the work process and immediate corrective action.

Fill out the Procurement Management Plans [one plan for each project] provided below using the risk matrix.

Please ensure you identify the following:

- minimum one risk the procurement activities and/or tasks might involve
- CBSA current controls relevant to the risk identified
- consequences if the risk is not mitigated
- what the likelihood for this risk to happen is
- risk rate
- how we can treat the risk should this happen.

Assessor instructions: The student is required to develop a project procurement management plan. They must use vocabulary and structure appropriate to the audience, context and purpose and complete project documentation using the required formats and structure.

Students are required to document their responses using the Procurement Management Plan template and demonstrate that they have used the information provided in the brief requirements.

- The Procurement Management Plan requires students to complete a risk assessment for procurement activities/tasks.
- Students must identify:
 - minimum one risk the procurement activities and/or tasks might involve
 - CBSA’s current controls relevant to the risk identified
 - consequences if the risk is not mitigated
 - what the likelihood for this risk to happen is
 - risk rate
 - how we can treat the risk should this happen.
- In the process of this, students must use the Risk Rating Matrix.
- Students must include in their plan the name of suppliers and their contact.

Sample answers are provided below.

Procurement Management Plan 1

PROCUREMENT MANAGEMENT PLAN 1						
Overview:						
Related project:	<i>Customer Service Software Purchase and Implementation</i>					
Date required by:	<i>15 October</i>					
Risk Assessment						
<i>The following risks, their impacts and consequences and any treatments are documented as follows.</i>						
Risk	Current Controls	Impact	Consequence	Likelihood	Risk Rating	Risk Treatment
<i>Staff not trained in</i>	<i>None</i>	<i>High</i>	<i>Loss of customer data/orders</i>	<i>Very likely</i>	<i>High</i>	<i>Schedule training two</i>

<i>using new software</i>						<i>days before implementation</i>
<i>Loss of data</i>	<i>Automatic nightly backup</i>	<i>High</i>	<i>Loss of customer data/orders</i>	<i>Likely</i>	<i>High</i>	<i>Backup nightly</i>

Market Approach
Quotes will be sought from the following suppliers.

Supplier	Contact
<i>XYZ customer service software</i>	<i>9885566775</i>
<i>Gen X software</i>	<i>5588997710</i>
<i>We serve you software</i>	<i>4465871100</i>

Procurement Activity/Task	Required Resources <i>Including HR, Material, Equipment</i>	Timeline	Budget	Quality Requirements	Task Owner <i>Person responsible for undertaking the task</i>
<i>Develop terms and conditions</i>	<i>IT manager and lawyer</i>	<i>1 week</i>	<i>\$1,200</i>	<i>Detailed terms and conditions with guarantees of installation and timeframes</i>	<i>IT manager</i>
<i>Software user contract</i>	<i>IT manager and lawyer</i>	<i>1 week</i>	<i>\$70</i>	<i>Detailed terms and conditions with guarantees of installation and timeframes</i>	<i>IT manager</i>

The approval or non-approval to proceed is documented below:

Approved (Y/N)	<i>Yes</i>
Approver	<i>Wi Zhang</i>
Position	<i>Chief Financial Officer/Project Manager</i>
Date	<i>5 July</i>

Procurement Management Plan 2

PROCUREMENT MANAGEMENT PLAN 2						
Overview:						
Related project:	<i>Additional new office in Melbourne</i>					
Date required by:	<i>14 July</i>					
Risk Assessment						
<i>The following risks, their impacts and consequences and any treatments are documented as follows.</i>						
Risk	Current Controls	Impact	Consequence	Likelihood	Risk Rating	Risk Treatment
<i>Suitable premises not found.</i>	<i>None</i>	<i>High</i>	<i>Cannot open the new office</i>	<i>Very likely</i>	<i>High</i>	<i>Seek several commercial agents to widen the search.</i>
<i>No car parking on site</i>	<i>None</i>	<i>High</i>	<i>Staff not having access to cars to visit clients on-site</i>	<i>Likely</i>	<i>High</i>	<i>Seek several commercial agents to widen the search.</i>
Market Approach						
<i>Quotes will be sought from the following suppliers.</i>						
Supplier			Contact			
<i>Melbourne commercial lease company</i>			<i>9885599666</i>			
<i>National real estate</i>			<i>5577221111</i>			
<i>First reality commercial</i>			<i>8885553333</i>			
Procurement Activity/Task	Required Resources <i>Including HR, Material, Equipment</i>	Timeline	Budget	Quality Requirements	Task Owner <i>Person responsible for undertaking the task</i>	
<i>Lease document</i>	<i>Lawyer</i>	<i>2 weeks</i>	<i>\$1,750</i>	<i>Detailed long-term (min five years) with car parking</i>	<i>Lawyer</i>	
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The approval or non-approval to proceed is documented below:	
Approved (Y/N)	<i>Yes</i>
Approver	<i>Wi Zhang</i>
Position	<i>Chief Financial Officer/Project Manager</i>
Date	<i>5 July</i>

Assessment checklist:

Students must have completed two [2] tasks within this assessment before submitting. This includes:

1	Task 1: Procurement Requirement Templates [2]	<input type="checkbox"/>
2	Task 2: Procurement Management Plans [2]	<input type="checkbox"/>



Congratulations, you have reached the end of Assessment 2!

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