



BSBPMG540

ASSESSOR GUIDE

MANAGE PROJECT INTEGRATION

Assessment 2 of 13

Project and role-play observation



Assessment Instructions [general]

Task overview

This unit requires you to implement and manage project integration on at least three occasions.

For each occasion, you will establish, plan, monitor and review a different project (three separate projects):

Occasion 1 is covered by:

- Assessment tasks 2, 3, 4 and 5

Occasion 2 is covered by:

- Assessment tasks 6, 7, 8 and 9

Occasion 3 is covered by:

- Assessment tasks 10, 11, 12 and 13

This assessment task 2 is divided into two (2) parts:

- **Part A – Project Charter (project and observation)**
- **Part B – Develop and negotiate approval of project management plan (project and assessor observation)**

Read the case study and complete each part.

Additional resources and supporting documents

To complete this assessment, you will need:

- Access to a computer with internet
- Access to Microsoft word or similar
- Access to a meeting area
- CBSA Project Management Policy and procedure [available via the CBSA website]
- Project Charter template [provided in Part A]
- Email template [provided in Part B]
- Project Management Plan template [provided in Part B]

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:

- a. the processes for conducting the assessment (e.g. allowing additional time)
- b. 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 instructions [for the student] Part A: Project Charter

Case study: You work as a Project Manager, Billy Walsh, for Complete Business Solutions Australia (CBSA). You have received the following email from Gavin Stead, Managing Director, about a project to commence in **April 20XX**.



To: Billy.walsh@cbsa.com.au
From: gavin.stead@cbsa.com.au
Date/time: Monday 10.05 a.m, 1 April 20XX
Subject: Small Business Conference Project
Attachment: Project Charter Template.docx

Good morning Billy,

Last week the CBSA Board met and discussed key strategic goals for the organisation over the coming 12 months.

As you are aware, the CBSA mission is to 'help businesses to help themselves'. As part of this, we are committed to meeting the needs of business owners.

To support these strategic goals, the CBSA Board has decided to establish an annual conference for small business owners. The conference will focus on business management and leadership areas that are considered to be of key importance. It is hoped that the conference will provide information on cutting-edge leadership topics that focus on leadership skills, knowledge and trends.

The purpose of the conference is two-fold. Firstly, it aligns with our mission to help business owners, and it provides an excellent forum for promoting CBSA services to the business community and showcasing our expertise as business consultants. We aim for it to generate \$300,000 in consultancy services within the next 12 months.

The conference should be held in early October 20XX. It is envisaged as a one-day event, from 9 a.m. to 4 p.m., with a networking function to be held directly afterwards. We would like this to be a cocktail party-style event.

The Board is very keen for the conference to be delivered in a professional way, utilising a high-quality conference venue with a conference room that can accommodate up to 150 people. The conference should be fully catered to the highest standards, and the expectation is that we receive a 95% satisfaction rate for catering.

We also want to source business leaders and experts as speakers throughout the conference. These should be on topics including **taxation, marketing and innovation**.

The Board has allocated a budget of \$30,000 for this project; however, there is an expectation that delegate tickets will offset these costs or provide a modest profit to the business.

You will be responsible for the project management of the event. Specifically, you will need to arrange the venue, catering, resources required during the conference, booking of speakers, conference programming and contracting an external provider to coordinate online ticketing sales. Another team will manage the marketing of this conference; however, that project cannot commence until venues and speakers are confirmed.

This is classed as a medium-sized project, so I have allocated my Personal Assistant, Sally Pierce, as your Project Assistant. I would also like you to involve Tim Gibbons from accounts, who will help with the financial side of the project. Tim has indicated costings should be set at **\$200 per ticket x 150 participants** to recover \$30,000 expenditure.

Please refer to the Project Management Policy and Procedure available on the BSA website to guide you in managing this project.

As a first step, please draft a **Project Charter** based on the information I have provided and email it back to me within the next two working days. We will then meet to discuss your draft and finalise the Project Charter. I want this project to start immediately for April 20XX.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Attachment to email:

- Project Charter Template.docx (separate attachment)

Steps

Based on the email, complete the following tasks.

1. Prepare a **draft Project Charter**:

- Review the contents of the email from the CEO, Gavin Stead
- Locate and review the *CBSA Project Management Policy and Procedure* (available via the CBSA website)
- Open the attachment **CBSA Project Charter** (Ass No 2_Part A_CBSA Project Charter template) to develop a **draft Project Charter** based on the information provided for the CBSA Small Business Conference.
- Save the draft charter as Draft Project Charter.

2. **Participate in a meeting with the CEO** (your Assessor will play the role of Gavin Walsh, CEO)

To complete this step, you must have completed step 1 draft project charter. The role-play meeting will include your Assessor acting in the role of Gavin Walsh, CEO and must not exceed 20 minutes in duration and address all elements of the Observation Checklist below. Your Assessor will advise of the date on which the meeting will be held.

During the meeting, you must:

- present and discuss your draft Project Charter. You need to provide a clear rationale for every aspect of the Charter to gain the support and approval of the CEO for the proposed project scope.
- discuss, negotiate and seek clarification about project objectives, outcomes and benefits.

During the meeting, your assessor in the role of the CEO will propose a different viewpoint to that outlined in your Project Charter, and you will be required to demonstrate your negotiation skills to achieve a win-win outcome.

During the project meeting, your assessor will also be looking to see that you can demonstrate communication and teamwork skills, including:

- speak clearly and concisely when sharing and seeking information
- ask questions to identify the required information
- use active listening techniques to elicit information and confirm understanding
- collaborate and cooperate with others to achieve shared goals
- negotiate with others to achieve outcomes.

3. **Update/revise Project Charter**

After the meeting, make any adjustments or revisions to the Project Charter based on the agreements made during the meeting.

- Save the document as *Final Project Charter*.
- Submit the revised Project Charter via the LMS for approval by the Project Sponsor.

Submission instructions

Submit your assessments and recording of your role play/observation via the LMS.

Assessor instructions Part A: Project Charter

There is no submission due date for this task. Students may submit this task when they are ready. Review all evidence and mark using the assessment checklist and assessment marking criteria.

Purpose of task

This part is designed to ensure the student can establish a project and develop and negotiate a Project Charter.

Guidance to assessor about the task

Use the following as a guide to ensure that the student has completed the tasks for this assessment part successfully.

1. Prepare a draft Project Charter

PROJECT CHARTER	
Project Sponsor	CBSA
Project Name:	Small Business Conference
Project Manager:	Billy Walsh

Background

<<Explain why the project is being undertaken and describe the opportunity or problem that the project is to address. Include an explanation of the relationship between the project and broader organisational strategies and goals.>> [Word guidance: 80 words]

The student's words may vary, but their response must include:

CBSA's mission is to 'help businesses to help themselves'. As part of this, we are committed to meeting the needs of business owners.

To support these strategic goals, the CBSA Board has decided to establish an annual conference for small business owners. The conference will focus on business management and leadership areas that are considered to be of key importance. It is hoped that the conference will provide information on cutting-edge leadership topics that focus on leadership skills, knowledge and trends.

Project objectives

<<Document specific and measurable objectives for the project.>> [Word guidance: 40 to 50 words]

This draft version will be discussed in Part B, so the student's answers may not match the following. The following is a guide, and responses will be similar to the following, and it is okay if not all points are covered in their draft.

To help businesses to help themselves by establishing an annual conference for small business owners in October 20XX..

To establish an annual conference for small business owners in October 20XX with 150 participants @ \$250 per ticket.

95% satisfaction rate for catering.

Project Benefits

<<Define the benefits the project will bring to the organisation and stakeholders.>> [Word guidance: 25 to 35 words]

The student's words may vary, but their response must include:

- *CBSA – the conference will help showcase their expertise*

- Small business owners attending the conference will learn cutting-edge leadership topics focusing on leadership skills, knowledge and trends.

Student's may identify additional benefits including:

- Opportunity to network and meet similar business owners
- Compare strategies and techniques in business ownership
- Gain new knowledge or way to improve current practice

Project Deliverables

<<What outcomes will the project deliver? Include any products, services or documentation that will be delivered at the close of the project.>> [Word guidance: 15 to 30 words]

The student's words may vary, but their response must include:

- Annual conference for small business owners with 150 participants
- generate \$300,000 in consultancy services within the next 12 months

Key Stakeholders

<<Describe the proposed project governance structure and key decision makers according to the CBSA project management policy and procedures available from the CBSA website>> [Word guidance: 25 to 30 words]

The student's response must include:

- Tim Gibbons – Accounts – to assist with project financials
- Personal Assistant – Sally Pierce – Project Assistant to provide project assistance
- Gavin Stead, Managing Director, Project Sponsor
- CBSA Board – Project Steering Committee

Project Budget

<<Describe the project budget and main project expenses.>> [Word guidance: 50 words]

The student's response must include:

Expenses include:

- Caterer for cocktail party event and conference to be fully catered to the highest standards for up to 150 people
- Conference room to accommodate up to 150 people
- Business leaders and experts as speakers
- \$3,000 budget to be offset by delegate tickets - it's \$30,000
- External ticket sales provider

Project Timelines

<<Outline project timelines.>> [Word guidance: 280 to 300 words]

The student must identify key timelines, and the below is used as a guideline. The student must include information covering research venue and catering, marketing, budget, drafting conference program and a review process to include surveys and finalise all financial documents.

- Conference to be held in early October 20xx
- May - Venue research commences - availability and location used to confirm the final date of the conference
- Commence catering availability research - may be included in venue depending on locations shortlisted
- May/June - Research and shortlist appropriate guest speakers - send out an initial email checking their availability in October, fees and requirements to attend

- *May - confirm date and day (earlier if possible)*
- *May/June - Confirm venue selection and inclusions*
- *May - commence invitations shortlist and areas to advertise or market for ticket sales*
- *May Steering Meeting Committee update and review*
- *June - Confirm guest speakers and book in*
- *June - (as needed) finalise the selection of catering, drinks, and if entertainment is required (music, lights etc. or is included in venue hire)*
- *June - contract ticket sales provider with all confirmed details of the Conference*
- *June - draft marketing strategy from the Marketing department and seek final approval*
- *End of June - commence promotion*
- *End of June - Budget review*
- *Steering Meeting Committee update and review*
- *July - draft conference programs & July - program to internal stakeholders for review and feedback*
- *August - finalise specific invitations listing and circulate - 'Save the date' announcement out*
- *August - design feedback survey to be sent via email to all stakeholders post the event*
- *August - Steering Meeting Committee update and review*
- *September - organise printing of the program once all details are confirmed as correct*
- *Steering Meeting Committee update and review*
- *October - organise access to the venue to prepare any equipment etc., that is needed*
- *October - Conference*
- *October - Finalise payments as needed*
- *October - email out a survey for feedback collation within 7 days*
- *October - commence project reporting collation*
- *Final Budget review and report*

2. Meeting with CEO

Instructions to Assessor:

Prior to the meeting:

- Provide students with the date on which the meeting will be held.
- Review the Team Role Information below so you are clear on the requirement of your role
- Set up a quiet space for the meeting.
- Allocate 20 minutes for this meeting.
- Ensure that the student has completed the **Draft Project Charter** prior to commencing this role play.

Team Role Information:

Gavin Stead [Assessor]

- Gavin is the CEO of CBSA and will participate in the project team to approve decisions throughout.
- Contribute to discussions in line with the Project Management Plan.
- Gavin will report the progress of the project to the CBSA Board.

- Where required, Gavin may provide additional information to the discussions to help clarify specifics. The assessor should use discretion to provide additional fictional information to support the discussion and fill in any gaps required to clarify items that are raised.

Billy Walsh (Student)

- Billy is the Project Manager
- Billy is responsible for implementing the project

During the meeting

You will act as Gavin Stead CEO. In doing so, you need to lead and facilitate the meeting. Ensure that the following topics are covered:

- Welcome Billy to the meeting
- Confirm that the objective of the meeting is to discuss the Draft Project Charter and agree upon the scope of the project.
- Listen to the information provided by the student about the project.
- Present a counter-argument to one of the student's proposed project inclusions. For example, state that:
 - You believe the project should include the Board as the steering committee
 - You believe the project's objectives should be different from those the student advised (for example, the objectives should be organisational rather than project-based).
 - You question some of the student's proposed conference plans, e.g. of no benefit or too expensive.
- The student needs to negotiate project objectives, outcomes and benefits with you, as well as the governance structure. They should do this through clear, reasoned arguments and use of active listening skills and being able to negotiate a win-win outcome, e.g. the project charter could include both organisation and project objectives.
- Also, ensure that you discuss key project tasks with the student to enable them to identify key milestones and activities for the project management plan. This can be brainstormed by discussing key activities associated with the project. This might include developing a brief, seeking quotes, reviewing and selecting the most suitable quote, conducting a kick-off meeting and confirming project requirements, arranging and participating in meetings, conducting additional project communication, and evaluating and closing.
- Request that Billy adjusts the Draft Project Charter to incorporate the agreements and changes discussed during the meeting.

Throughout the meeting, ensure that the student has opportunities to utilise communication skills, including:

- speaking clearly and concisely when sharing and seeking information
- asking questions to identify required information
- using active listening techniques to elicit information and confirm understanding
- collaborating and cooperating with others to achieve shared goals
- negotiating with others to achieve outcomes.

After the meeting

- The student will complete step 3 to make adjustments and revisions to the Project Charter based on the agreements made during the meeting.

There is no submission due date for this task.

Review all evidence and mark using the assessment checklist and marking criteria listed below.

Marking criteria Part A: Project Charter

Assessment checklist

Students must have completed all tasks within this assessment before submitting. This includes:

Part A: Project charter		
1.	Draft project charter	<input type="checkbox"/>
3.	Update/revise project charter	<input type="checkbox"/>

Observation checklist

The assessor observed the student skills and satisfactorily [S] covered the following criteria or not yet satisfactory [NYS] and requires re-assessment.

MARKING CRITERIA / OBSERVATION CHECKLIST (To be completed by the Assessor in real-time as they conduct the assessment)		Satisfactory [S]	Not Yet Satisfactory [NYS]
2.	The student presented and discussed the draft project charter. Look for: <ul style="list-style-type: none"> clear rationale for every aspect of the Charter to gain the support and approval of the CEO for the proposed project scope 	<input type="checkbox"/>	<input type="checkbox"/>
	The student demonstrated communication and teamwork skills, including: <ul style="list-style-type: none"> ask questions to identify the required information 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> use active listening techniques to elicit information and confirm understanding 	<input type="checkbox"/>	<input type="checkbox"/>
	Look for: <ul style="list-style-type: none"> use open and closed questions, paraphrased to confirm understanding 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> collaborate and cooperate with others to achieve shared goals 	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> negotiate with others to achieve outcomes 	<input type="checkbox"/>	<input type="checkbox"/>
	Look for: <ul style="list-style-type: none"> expressed opinions listened to Project Sponsor agreed on outcome 	<input type="checkbox"/>	<input type="checkbox"/>

Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily [S] covered the following criteria, or the evidence is not yet satisfactory [NYS] and requires resubmission.

MARKING CRITERIA		Satisfactory (S)	Not Yet Satisfactory (NYS)
1.	The student submitted a draft project charter , and all fields were completed according to the benchmark. Refer to Guidance to Assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
3.	The student submitted a final project charter for approval, and all fields were completed according to the benchmark. Refer to Guidance to Assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>

Task instructions [for the student] Part B: Develop and negotiate approval of project management plan

To begin this part, read the following email and its attachment, then complete the tasks that follow:



To: Billy.walsh@cbsa.com.au
From: gavin.stead@cbsa.com.au
Date/time: Friday 11.25 a.m.
Subject: Small Business Conference Project
Attachment: Project Management Plan template.docx

Good morning Billy,

Thank you for sending the revised Project Charter. I can confirm that this is now approved.

Please move forward in developing an integrated draft Project Management Plan using the attached template.

We will review the draft PMP during the project team meeting next week.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Attachment to email:

- Project Management Plan Template.docx (separate attachment)

Steps

Based on the email, complete the following tasks

1. Develop a draft Project Management Plan (PMP):

Using your Project Charter and research, develop a draft Project Management Plan using the **Project Management Plan Template** provided.

Your PMP must include, as a minimum, the following:

- Project scope and constraints
- Project stakeholders and roles and responsibilities
- Project Milestones
- Work Breakdown Structure and dependencies
- Change management
- Monitoring processes
- Project communication
- Cost management
- Risk management

Save the document as *Draft Project Management Plan*.

Print out a copy of this document to take to the project team meeting with you.

2. **Facilitate a Project Team Meeting:**

Your assessor will play the role of Gavin Walsh, CEO, and you will need to arrange for another student/peer to play the role of Project Assistant.

The objective of this meeting is to present and discuss your draft Project Management Plan. You need to facilitate this discussion and provide a clear rationale for every aspect of the plan to gain the support and approval of the CEO and other project team member/s. You may also seek further clarification during the meeting if required.

During the meeting, project team members will seek to make changes to the Project Management Plan, which you may disagree with. You must demonstrate your negotiation skills to achieve an agreeable outcome.

During the project meeting, your assessor will also be looking to see that you can demonstrate communication and teamwork skills, including:

- speaking clearly and concisely when sharing and seeking information
- asking questions to identify the required information
- using active listening techniques to elicit information and confirm understanding
- collaborating and cooperating with others to achieve shared goals
- facilitating effective group interactions to negotiate outcomes.

Role play instructions

The role-play/meeting must include the assessor and one (1) other participant/s, must not exceed 20 minutes duration and must address all elements of the Observation Checklist below.

In this task, you will participate in a role/play meeting with others. These may be resourced using one of the following options:

1. Peer/s who you are already working with, in the industry your qualification relates to.
2. Fellow student/s who will play the role of a team member. Please contact your fellow student/s via the Discussion Forum and coordinate your role-play with them directly.

If you are unable to find a participant/s to play the role of the other team member/s, contact your assessor via the Discussion Forum, who will discuss options for pairing up with another student/s to complete this task.

Option 1: Peer/s participant

Should you complete this task with your Peer/s, you must fully brief all participant/s, providing them with the context of the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

Peer/s will need to state their name and job title at the start of the recording to inform consent.

Option 2: Fellow student/s participant

Fellow student/s participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Student/s will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

Recording instructions

Your role play must be recorded with all participant/s captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participant/s at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time 20-minute limit.

Include this recording as part of your assessment submission.

3. Update/revise Project Management Plan:

After the meeting, you will be required to make any adjustments or revisions to the Project Management Plan based on the agreements made during the meeting.

Ensure you submit both the draft and final Project Management Plan.

Submission instructions

Submit your assessment and a recording of your role play/observation via the LMS.

Assessor instructions Part B: Develop and negotiate approval of project management plan

There is no submission due date for this task. Students may submit this task when they are ready. Review all evidence and mark using the assessment checklist and assessment marking criteria.

Purpose of task

This part is designed to ensure the student can undertake project planning and design processes.

Guidance to assessor about the task

1. Prepare a draft Project Management Plan

Project Management Plan	
Project Sponsor	CBSA
Project Name:	Small Business Conference
Project Manager:	Billy Walsh

Background/Context:
<<Provide a brief explanation of the background and/or context of the project. >>
Student answers will be the same as Part A unless changes were required from the team meeting

Objective:
<<What is the aim of this project?>>
Student answers will be the same as Part A unless changes were required from the team meeting

Target Outcomes:
<<Benefit that the project intends to achieve.>>
Student answers will be the same as Part A unless changes were required from the team meeting

How the success of the project will be measured:
<<Describe the measure(s) that will be used to indicate that the project has been successfully completed.>>
Benchmark
Student answers will be the same as Part A unless changes were required from the team meeting
Attendance 90% minimum of 150 at the event [135] - yes/no?
Project timelines and tasks met/completed a minimum of 24-48 hours prior to the event
The project budget was met, and a small profit made
Feedback from email surveys [not related to the completion of the project but feedback on success]

Project Scope and constraints:

<<Provide a scope statement that describes what the project does and does not include.>>

<<Identify constraints related to the project and how these constraints impact project planning.>>

The student responses will vary at the Diploma level.

The completion of this project will be measured by:

Successful execution of the conference, including:

- *Location and catering*
- *Guest speakers in relevant areas - taxation, marketing and innovation*
- *Conference programs and physical resources*
- *Satisfactory ticket sales from an external provider*
- *Marketing of events through a separate department*
- *Guest satisfaction surveys post the event*

The project does not include the following aspects:

- *Accommodation and parking for the event*
- *Travel to and from the conference for attendees*

Constraints: may include:

- *Availability of suitable conference venue - may delay booking and promotion of the event*
- *Time - planning of the conference may be more detailed than initially thought*
- *Cost - budget may not be adequate to cover the requirements outlined for the conference*
- *Resources - Guest speakers' availability and areas of expertise - may alter original program planning*

Project Stakeholders:

<<Provide a list of project stakeholders, detailing governance structure and project team roles and responsibilities.>>

As per the charter draft. At the Diploma level, students may list additional roles and responsibilities such as approval of costings, report collation, liaison with related departments, administration and recording.

Milestone list:

<<Provide a summary list of milestones, including dates for each milestone. Include an introductory paragraph in this section which provides some insight into the milestones.>>

Milestones are outlined below to be met to ensure the delivery of the project in relation to the details of the conference as directed and to align with the appropriate timelines in planning.

Milestone	Description	Date
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Project Management Plan

<i>Venue selection</i>	<i>Confirm and book a suitable location for the event</i>	<i>TBA</i>
<i>Date confirmation</i>	<i>Confirm the date and timings</i>	<i>TBA</i>
<i>Guest speakers confirmed</i>	<i>Contact and confirm the Guest Speakers in outlined specialisations</i>	<i>TBA</i>
<i>Marketing details to commence</i>	<i>Venue, date and guest speakers information to marketing to promote the event</i>	<i>TBA</i>
<i>Tickets on sale</i>	<i>Tickets made available for attendees to purchase</i>	<i>TBA</i>
<i>Programs printed</i>	<i>Printing of conference programs with correct details and associated information</i>	<i>TBA</i>
<i>Ticket sale exceed 100</i>	<i>Initial goal met</i>	<i>TBA</i>
<i>Feedback surveys finalised</i>	<i>For use post-event for feedback and evaluation of the event</i>	<i>TBA</i>
<i>Ticket sales at 150 maximum</i>	<i>Fully recovery of cost and profit</i>	<i>TBA</i>

Change Management:

<<Describe change control processes.>>

Students must describe the change control process. Students' words will vary, but their responses must reflect the content below.

For any required changes that need to be considered or approved for the project, the following process will occur to the steering committee and project team as necessary:

- Request change - detail reason for the change*
- Assess change - outline impact on project and alternatives offered*
- Seek change approval from relevant stakeholders/Steering committee*
- Implement change as needed across project documentation*

Project monitoring:

<<Describe processes/tools that will be put in place to monitor project activities and performance.>>

Students must outline the processes and tools to monitor the project activities and performance. Their responses may vary at the Diploma level, and acceptable responses must include any dot point from the following list:

- Schedule*
- WBS*
- Task plan and activities*
- Project team meetings*

Project Management Plan

- *Project monitoring will occur through monitoring the associated task breakdown, schedule and scope of the project.*
- *Weekly review of the project and its deliverables will occur with updates and prioritisation as needed*

Project Communications:

<<List the project communications activities, including meetings and project status reports.>>

Communication type	Description	Who	Scheduled start	Scheduled finish
<i>Students must complete each field, and communication types may vary, such as meetings and email.</i>				
<i>Meeting</i>	<i>Finalise details for conference date and venue</i>	<i>Steering Committee Project team Stakeholders</i>	<i>TBA</i>	<i>TBA</i>
<i>Email</i>	<i>Confirm confirmation details to all relevant parties</i>	<i>Project team Finance Marketing</i>	<i>TBA</i>	<i>TBA</i>

<<Add or delete rows as required.>>

Project Budget:

<<Include approved project budget as per project charter.>>

\$30,000 budget allocated

Cost area	Details	Estimated cost
<i>Students must identify budgets and costs. The budget allocated is \$30,000. Students' breakdown of costs will vary but must cover catering, venue and speakers. Other costs may be included, such as registration costs.</i>		

Project Management Plan

<i>Venue Hire</i>	<i>Hire of convention location: inclusive of all equipment and resources for guest speakers</i> <i>Table and chairs</i> <i>Water, tea and coffee all-day</i> <i>Notebooks and pens</i> <i>For up to 150 attendees</i> <i>Availability 0700-1700</i>	<i>\$2,100</i>
	<i>Evening cocktail party inclusive of:</i> <i>Canapes</i> <i>Wine and Beer</i> <i>Set up of room for a cocktail event</i> <i>For up to 150 attendees</i> <i>Availability: 1830-2200</i>	<i>\$7,500</i>
<i>Catering</i>	<i>Morning tea</i> <i>Lunch</i> <i>Afternoon tea</i> <i>Fresh fruit platters</i> <i>For conference events of up to 150</i>	<i>\$11,000</i>
<i>Speakers</i>	<i>Speakers</i>	<i>\$4,500</i>
	Total	\$25,100

<<Add or delete rows as required.>>

Risk management strategy:

<<List the major risks identified from the business case, as well as the consequences of the risk occurring. Use the risk assessment legend to establish severity and likelihood. Document risk treatment/control measures.>>

Risk	Likelihood	Severity	Treatment/control methods
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Project Management Plan

The student must identify the following two risks. Other risks may also be included, such as venue costs.			
<i>Venue unavailable</i>	<i>Low</i>	<i>Severe</i>	<i>Have alternate options available at short notice</i>
<i>Guest speaker unavailable</i>	<i>Low-Med</i>	<i>Minor</i>	<i>Have alternate options available to backfill space</i>

2. Meeting with Project Team

Prior to the meeting

- Provide students with the date on which the meeting will be held.
- Review the Team Role Information below so you are clear on the requirement of your role and the roles of actors.
- Arrange for actors to play roles. Ensure they have reviewed the team role information.
- Set up a quiet space for the meeting
- Allocate 15–20 minutes for this meeting
- Ensure that the student has completed the **Draft Project Management Plan** prior to commencing this role play.

Team Role Information:

- **NOTE:** all role players are encouraged to contribute to the discussion as long as contributions are in line with the Project Management Plan and the team roles below.

Gavin Stead [Assessor]

- Gavin is the CEO of CBSA and will participate in the project team to approve decisions throughout.
- Gavin should question the PMP and make suggestions for changes to the plan during this meeting (the assessor will need to use discretion when determining an adjustment to the plan). The idea here is not to 'pull apart' the PMP but to offer ideas for adjustment. Negotiate for adjustments, compromising where appropriate. Ensure suggestions are realistic and reasonable.
- Where required, Gavin may provide additional information to the discussions to help clarify specifics. The assessor should use discretion to provide additional fictional information to support the discussion and fill in any gaps required to clarify items that are raised.

Sally Pierce (Actor)

- Sally is the Personal Assistant for the CEO (Gavin Stead)
- Sally has worked in an events business in the past so has some experience in organising event venues etc
- Sally should raise ideas/concerns/suggestions about items related to the venue and catering
- The idea here is not to 'pull apart' the PMP, but to offer ideas for adjustment. Negotiate for adjustments, compromising where appropriate. Ensure suggestions are realistic and reasonable.

Tim Gibbons (Actor)

- Tim is an Accounts Officer
- Tim's role is to help with managing the finances of the conference
- Tim is always looking for ways to reduce costs, so should question prices and budgets and attempt to get budget expenditures lowered.

Billy Walsh (Student)

- Billy is the Project Manager
- Billy is responsible for implementing the project

During the meeting

You will act as Gavin Stead CEO. In doing so, you should greet everyone and hand the meeting over to Billy (student) to facilitate as the Project Manager.

- Invite Billy (student) to present the draft PMP and facilitate the meeting
- Present a counter-argument to one of the student's proposed project inclusions. For example, state that:
 - Question budget allocations
 - Identify additional risks
 - Suggest additional communication strategies
 - Suggest adjustments or additional milestones
 - You do not need to present these exact arguments. You may suggest other ideas, but remember the idea is not to 'pull apart' the plan – it is to offer suggestions and adjustments to perfect the plan
- Ensure/invite Sally Pierce (actor) to offer her suggestions/ideas
- Encourage negotiation and agreement on adjustments
- Request that Billy (student) adjust the Draft Project Management Plan to incorporate the agreements and changes discussed during the meeting

Throughout the meeting, ensure that the student has opportunities to utilise communication skills, including:

- speaking clearly and concisely when sharing and seeking information
- asking questions to identify the required information
- using active listening techniques to elicit information and confirm understanding
- collaborating and cooperating with others to achieve shared goals
- facilitating effective group interactions to negotiate outcomes.

3. Revise the draft Project Management Plan

- Revised Project Management Plan must include all agreed-upon adjustments during the meeting.

There is no submission due date for this task.

Review all evidence and mark using the assessment checklist and marking criteria listed below.

Marking criteria Part B: Develop and negotiate approval of project management plan

Assessment checklist

Students must have completed all tasks within this assessment before submitting. This includes:

Part B: Develop and negotiate approval of project management plan		
Step 1.	Draft Project Management Plan	<input type="checkbox"/>
Step 2.	Role-play video evidence – meeting 15-20 minutes	<input type="checkbox"/>
Step 3.	Revised project management plan	<input type="checkbox"/>

Observation checklist

The assessor observed the student skills and satisfactorily [S] covered the following criteria or not yet satisfactory [NYS] and requires re-assessment.

MARKING CRITERIA / OBSERVATION CHECKLIST (To be completed by the Assessor when they watch the video or observe the assessment in real-time as they conduct the assessment)		Satisfactory [S]	Not Yet Satisfactory [NYS]
Step 2.	Demonstrate negotiation skills to achieve an agreeable outcome	<input type="checkbox"/>	<input type="checkbox"/>
	Demonstrate communication and teamwork skills Look for: <ul style="list-style-type: none"> speaking clearly and concisely when sharing and seeking information asking questions to identify the required information using active listening techniques to elicit information and confirm understanding collaborating and cooperating with others to achieve shared goals facilitating effective group interactions to negotiate outcomes. 	<input type="checkbox"/>	<input type="checkbox"/>

Assessment marking criteria

Assessor instructions: All sections must be completed. Refer to the template for sample answers and benchmarks.

The evidence submitted demonstrates that the student has satisfactorily [S] covered the following criteria, or the evidence is not yet satisfactory [NYS] and requires resubmission.

MARKING CRITERIA		Satisfactory [S]	Not Yet Satisfactory [NYS]
Step 1.	The student submitted a draft Project Management Plan and all fields were completed according to the benchmark. Refer to Guidance to Assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
Step 3.	The student submitted a revised Project Management Plan and included modifications identified in step 2 – role play.	<input type="checkbox"/>	<input type="checkbox"/>

Congratulations, you have reached the end of Assessment 2!



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