



BSBPMG427

# Apply project procurement procedures

Assessment 5 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:

- Learning Material



## 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

This is a continuation of assessments 2, 3 and 4 – Project.

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

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

Good afternoon Trish,

I wish to thank you for completing both the Procurement Activities Register Template and the Procurement Monitoring Template. We are almost at the end of both projects and need to finalise various procurement activities for the projects.

I would like you to assist me in reviewing the implemented procurement process. This review allows us to examine the outcomes to gain insights into future improvements and make required changes.

Please complete the review using the attached Procurement Review Checklist.

Feel free to add any additional activities should I miss any.

Kind Regards,

Wi Zhang

Chief Finance Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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In this part, you are required to review the implemented procurement process for each of the two projects.

To do this, you will need to reflect on each activity completed during the procurement process and fill in the **Procurement Review Checklist** provided below for both projects.

Feel free to add any additional activities should you identify any missing from the template provided.

**Assessor instructions:** The student must demonstrate that they conduct a review of the procurement activities using the Procurement Review Checklist.

The student will conduct a review using Procurement Review Checklist for both projects using the information from the previous Assessments. The student may add additional items to the checklist depending on procurement activities identified in the various assessment tasks and plans that require review.

The student should be able to demonstrate that they have adhered to the assessment brief instructions:

- they are able to demonstrate that they can contribute to reviewing the procurement activities
- they can assist in conducting the review by completing the procurement review checklist.

For Project 2, the students must identify that the product/service did not meet the project objectives and that the invoice was not paid.

The correct responses are provided below.

▪ Procurement Review Checklist 1

PROCUREMENT REVIEW CHECKLIST			
Project 1: Customer Service Software		Participants in review: Wi Zhang – Project Manager and Trish Gibbons Project Officer	
Procurement Activity	Review Date	Checklist Review Question	Answer Yes or No Comments
Procurement process	10 Nov	Was the contracting and procurement process well-planned and comprehensive?	Yes
Project scope	10 Nov	Was the project scope clearly written?	Yes
Tenders or requests for quotations	10 Nov	Were the tenders or requests for quotations clearly written? Did they align with the project objectives?	Yes
Selection of supplier	10 Nov	Was the evaluation criteria, weighting and scoring system clear to be able to select suppliers effectively? Were those involved in the selection process suitably informed, experienced or qualified people? Were enough suppliers sourced?	Yes Yes
Suppliers	10 Nov	Did the products and services purchased meet the project objectives? Were the products and services purchased at the required standard and quality?	Yes Yes
Contract management	10 Nov	Was the contract effectively managed?	Yes
Invoice management	10 Nov	Did the invoice amounts match the contract? Were the invoices processed at the intervals as per the contract?	Yes
Invoice payment	10 Nov	Were the invoices paid on time?	Yes
Finalisation of project procurement	10 Nov	Were the procurement documents finalised and stored correctly and securely according to CBSA requirements?	Yes

■ Procurement Review Checklist 2

PROCUREMENT REVIEW CHECKLIST			
Project 2: Additional Office Melbourne		Participants in review: Wi Zhang – Project Manager and Trish Gibbons Project Officer	
Procurement Activity	Review Date	Checklist Review Question	Answer Yes or No Comments
Procurement process	10 Nov	Was the contracting and procurement process well-planned and comprehensive?	Yes
Project scope	10 Nov	Was the project scope clearly written?	Yes
Tenders or requests for quotations	10 Nov	Were the tenders or requests for quotations clearly written? Did they align with the project objectives?	Yes Yes
Selection of supplier	10 Nov	Was the evaluation criteria, weighting and scoring system clear to be able to select suppliers effectively? Were those involved in the selection process suitably informed, experienced or qualified people? Were enough suppliers sourced?	Yes Yes Yes
Suppliers	10 Nov	Did the products and services purchased meet the project objectives? Were the products and services purchased at the required standard and quality?	No – the Real Estate Agent has not been able to source suitable office space with the 15 car parking spots requested by the due date.  Yes
Contract management	10 Nov	Was the contract effectively managed?	Yes
Invoice management	10 Nov	Did the invoice amounts match the contract? Were the invoices processed at the intervals as per the contract?	Yes
Invoice payment	10 Nov	Were the invoices paid on time?	No – until a suitable place is found
Finalisation of project procurement	10 Nov	Were the procurement documents finalised and stored correctly and securely according to CBSA requirements?	Yes

## Task 2

### Case study

Wi sent you the following email:

Good afternoon Trish,

Now that you have completed the Procurement Review Checklist, I would like you to summarise the changes to project procurement procedures based on feedback received from our discussion. I have provided you with a Procurement Changes Matrix that you can use to document the changes.

Kind Regards,

Wi Zhang

Chief Finance Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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In this part, you are required to summarise the changes that should be considered for our future project procurement based on feedback received from the Operational Manager for Project. Please see this reproduced below.

### Project 2: Brief

Based on the Operation Manager's feedback, Real Estate Agent has not been able to source suitable office space with the 15 car parking spots requested by the due date. Parking is dependent on the lease of the office, and all 15 parking spots were meant to be included in the rent at \$650.00 per week.

If the Real Estate Agent cannot source a suitable office with the car parking requirement, the Terms and conditions of the contract will need to change, or CBSA will need to find a different Real Estate Agency.

Your review result was recorded in Procurement Review Checklist completed in the previous task.

Contribute to making changes to the project procurement procedure by completing this task using the **Procurement Changes Matrix** provided below.

You must have an answer for all of the procurement activities included in the template.

**Assessor instructions:** The student must demonstrate that they can contribute to making changes to project procurement procedures based on the feedback received. The student must complete the procurement changes matrix to recommend the changes.

Students' words will vary, but their responses need to reflect the content in the sample answer provided below.

## Procurement Changes Matrix

PROCUREMENT CHANGES MATRIX	
Project 2: Additional Office Melbourne	Participants in review: Wi Zhang – Project Manager and Trish Gibbons Project Officer
Procurement Activity	Recommended Changes
Procurement process	None
Project scope	Ensure car parking is clearly documented in the project scope for any additional offices in the future.
Tenders or requests for quotations	Ensure car parking is clearly documented in a request for quotations for any additional offices in the future.
Selection of supplier	None

**Assessment checklist:**

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

1	Task 1: Procurement Review Checklist [2]	<input type="checkbox"/>
2	Task 2: Procurement Changes Matrix [1]	<input type="checkbox"/>



**Congratulations, you have reached the end of Assessment 5!**

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