



**BSBPMG427**

# Apply project procurement procedures

Assessment 3 of 5

Project



## Assessment Instructions

### Task overview

This assessment is divided into four (4) 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:

- Goods and Services Contract

## 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 assessment 2 – 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 morning Trish,

Thank you for assisting in establishing procurement requirements for both projects and contributing to developing the procurement management plan.

Con Kafatos, our IT Manager, has requested that you select a preferred supplier for the new customer service software project.

I would also like you to recommend a preferred real estate agent for finding suitable premises to establish our new office in Melbourne.

Please use the attached evaluation criteria template to select the preferred suppliers from those we have shortlisted for this purpose.

You will find the profile summary of each supplier and the rating scale for each project in the attached tables.

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](http://www.cbsa.com.au)



#### ▪ *Shortlisted suppliers for Customer Service Software.docx*

SHORTLISTED SUPPLIERS FOR CUSTOMER SERVICE SOFTWARE		
Supplier	Cost	Company information
XYZ customer service software	\$200,000 installation for up to 25 users. \$5,000 per year fee and free upgrades.	The new company has only been in business for 12 months. New software with only three major clients. Great referees from clients. Cloud-based storage is not included in the price.
Gen X software	\$150,000 installation up to 100 users. \$7,000 per year fee and free upgrades and web-based training.	IT company in business for over ten years. Has customer service software, OHS software and HR software. 50 plus major clients across Australia. Average referees from clients. Cloud-based is not included in the price.

We serve you software	\$235,000 installation for up to 50 users. \$5,000 per year fee and free upgrades and web-based training.	Specialists in customer service and client management software. In business for 12 years and has Australian and international clients with great references from clients. Can customise the software at no extra cost. Cloud-based (included in price) and provides detailed instruction manuals and PowerPoint presentations.
-----------------------	---	--

The following rating scale can be used to evaluate suppliers' bids against the criteria and project requirements.

#### RATING SCALE

Project 1: Customer service software		Supplier:
Description	Definition	Rating
<b>Excellent</b>	Exceeds the requirement and has a thorough understanding of the project requirements. Has excellent and proven experience and ability to provide the required goods and services. Has the high-quality delivery, experience, skills and resources to provide the required goods or services. The supplier has provided additional information, including high-quality referees.	90–100
<b>Very good</b>	Satisfies the criteria and above average demonstration by the supplier of the relevant ability. Has good proven experience and ability to provide the required goods and services. Has very good quality of delivery, experience, skills and resources to provide the goods or services.	70–80
<b>Satisfactory</b>	Satisfies the criteria requirement and has some experience. Has the ability to provide the required goods and services. Has demonstrated some quality of delivery, skills and minimum resources to provide the goods or services.	40–60
<b>Not acceptable</b>	Does not meet the project requirements. Did not meet or comply with the criteria and did not provide any information to demonstrate that the supplier has the ability to provide goods or services. Did not provide any supporting evidence.	0–30

#### ▪ *Shortlisted suppliers for Melbourne Office.docx*

Supplier	Rental Cost/week	Company information
Melbourne Town Real Estate	\$650 per week	Specialists in CBD and inner Melbourne office and warehouse leases. In business for 35 years, has a large portfolio of stock available. Great referees from clients. Car parking extra.
Commercial Real Estate	\$650 per week	Specialists in the commercial lease, including an office in inner Melbourne. It has a large portfolio and many exclusive new office towers in CBD and inner Melbourne. Can offer a variety of fully fitted offices with new office furniture included in rental. Car parking is included (15 spots as requested). In business for 14 years. Great references from clients.

Browns Office Rentals	\$650 per week	It has very limited, but affordable stock available with only 10 car parking spots included and the lease is only for 3 years. In business for 22 years and have great references from clients.
-----------------------	----------------	---

The following rating scale can be used to evaluate suppliers' bids against the criteria and project requirements.

#### RATING SCALE

Project 2: Additional Office Melbourne		Supplier:
Description	Definition	Rating
<b>Excellent</b>	Exceeds the requirement and has a thorough understanding of the project requirements. Has excellent and proven experience and ability to provide the required goods and services. Has the high-quality delivery, experience, skills and resources to provide the required goods or services. The supplier has provided additional information, including high-quality referees.	90–100
<b>Very good</b>	Satisfies the criteria and above average demonstration by the supplier of the relevant ability. Has good proven experience and ability to provide the required goods and services. Has a very good quality of delivery, experience, skills and resources to provide the goods or services.	70–80
<b>Satisfactory</b>	Satisfies the criteria requirement and has some experience.  Has the ability to provide the required goods and services. Has demonstrated some quality of delivery, skills and minimum resources to provide the goods or services.	40–60
<b>Not acceptable</b>	Does not meet the project requirements. Did not meet or comply with the criteria and did not provide any information to demonstrate that the supplier has the ability to provide goods or services. Did not provide any supporting evidence.	0–30

- a) You need to select a preferred supplier for each of the CBSA's projects. In the process of this, you need to complete the following:
- analyse potential suppliers' information provided in the attachment of the email from the Chief Finance Officer [short-listed suppliers]
  - apply the rating scale for each project provided in the attachment of the email from the Chief Finance Officer [Rating Scale]
  - complete the **Evaluation Criteria Templates** for each supplier of each project provided below.

During this process, you must consider the project objectives and the project procurement management plan information from Assessment 2.

**Assessor instructions:** The student is required to select a preferred supplier using the information provided on the shortlisted potential suppliers for both projects. The student must use the provided evaluation criteria templates, the project objectives and the project procurement management plan information from Assessment 2 and select a preferred supplier for the two projects.

The student must be able to demonstrate that they can recommend and assist in the selection of preferred suppliers. The student must be able to read various documents to construct meaning from a variety of texts. The student must be able to demonstrate that they can plan, organise and implement tasks required to achieve outcomes according to organisational requirements.

Students are required to document their responses using the CBSA Evaluations Criteria template for each supplier for each project and demonstrate that they have used the information provided.

For Project 1:

Students will need to select “We serve you software” as the Customer service program supplier, as the XYZ customer service software has only been operating for 12 months, and cloud-based storage is not included in the price, which must result in a lower score and “Gen X software” has average client reviews and the cloud-based storage is also not included in the price which will also result in a lower score.

For Project 2:

Students will need to select “Commercial Real Estate” as the supplier, as the Melbourne Town Real Estate does not include car parking, and Browns Office Rentals has very limited stock, only 10 car parking spots available and the lease is only for 3 years.

For both projects, even if the scores are not exactly the same as the sample answers provided below, the student **must** end up choosing “We serve you software” and “Commercial Real Estate” as the preferred suppliers.

Sample answers are provided below.

### Evaluation Criteria Templates – Project 1

Project 1: Customer service software program		Supplier 1: XYZ customer service software	
Evaluation Criteria	Scored Weight	Allocated Weight	
Price			
Price of software	10%	40%	
Cloud-based storage for easy access by staff is included in the price.			
Progression payments (if applicable)			
Financial stability			
Proven experience in business and developing customer service software	15%	30%	
Proven operational and financial systems to manage the delivery of goods or services			
In business for over five years			
Relevant and proven experience			

Successful previous projects in the same area	15%	30%
Previous client recommendations		
Ability to provide a range of properties as per project schedule		
TOTAL Weight	40%	100%
Which description does the supplier fit in: <b>Satisfactory</b>		

Project 1: Customer service software program	Supplier 2: <b>Gen X software</b>	
Evaluation Criteria	Scored Weight	Allocated Weight
Price		
Price of software	30%	40%
Cloud-based storage for easy access by staff is included in the price.		
Progression payments (if applicable)		
Financial stability		
Proven experience in business and developing customer service software	30%	30%
Proven operational and financial systems to manage the delivery of goods or services		
In business for over five years		
Relevant and proven experience		
Successful previous projects in the same area	15%	30%
Previous client recommendations		
Ability to provide a range of properties as per project schedule		
TOTAL Weight	75%	100%
Which description does the supplier fit in: <b>Very good</b>		

Project 1: Customer service software program		Supplier 3: <b>We serve you software</b>	
Evaluation Criteria	Scored Weight	Allocated Weight	
Price			
Price of software	40%	40%	
Cloud-based storage for easy access by staff is included in the price.			
Progression payments (if applicable)			
Financial stability			
Proven experience in business and developing customer service software	30%	30%	
Proven operational and financial systems to manage the delivery of goods or services			
In business for over five years			
Relevant and proven experience			
Successful previous projects in the same area	30%	30%	
Previous client recommendations			
Ability to provide a range of properties as per project schedule			
TOTAL Weight	100%	100%	
Which description does the supplier fit in: <b>Excellent</b>			

### Evaluation Criteria Template – Project 2

Project 2: Additional Office Melbourne		Supplier 1: <b>Melbourne Town Real Estate</b>	
Evaluation Criteria	Scored Weight	Allocated Weight	
Price			
Space for 15 Car parks included	15%	40%	
Lease five years plus			
Inner Melbourne			
Financial stability			
Specialist in office lease	30%	30%	



Relevant and proven experience		
Successful previous projects in the same area	30%	30%
Previous client recommendations		
Ability to provide a range of properties as per project schedule		
TOTAL Weight	75%	100%
Which description does the supplier fit in: <b>Very Good</b>		

<b>Project 2: Additional Office Melbourne</b>		<b>Supplier 2: Commercial Real Estate</b>	
<b>Evaluation Criteria</b>	<b>Scored Weight</b>	<b>Allocated Weight</b>	
Price			
Space for 15 Car parks	40%	40%	
Lease five years plus			
Inner Melbourne			
Financial stability			
Specialist in office lease	30%	30%	
Relevant and proven experience			
Successful previous projects in the same area	30%	30%	
Previous client recommendations			
Ability to provide a range of properties as per project schedule			
TOTAL Weight	100%	100%	
Which description does the supplier fit in: <b>Excellent</b>			

<b>Project 2: Additional Office Melbourne</b>		<b>Supplier 3: Browns Office Rentals</b>	
<b>Evaluation Criteria</b>	<b>Scored Weight</b>	<b>Allocated Weight</b>	
Price			
Space for 15 Car parks	5%	40%	
Lease five years plus			
Inner Melbourne			

Financial stability		
Specialist in office lease	30%	30%
Relevant and proven experience		
Successful previous projects in the same area	10%	30%
Previous client recommendations		
Ability to provide a range of properties as per project schedule		
TOTAL Weight	45%	100%
Which description does the supplier fit in: <b>Satisfactory</b>		

- b) You need to recommend a preferred supplier for each of the CBSA's projects. Send an email to Wi Zhang using the email template below. In your email, you will need to include the following:
- The purpose of your email
  - The result of your analysis for each shortlisted supplier for each project (results and description)
  - The reason why you selected each supplier is based on the information provided in the case study.
- [Approximate word count: 150 - 200 words]

**Assessor instructions:** The students need to send an email with their recommendations to Wi Zhang, the Chief Finance Officer. In their email, they must include the purpose of their email, the results and the reasons they selected each supplier. All students must select the following suppliers:

**"We serve you software"** and **"Commercial Real Estate"**, and in their reasoning, they must include the facts provided in the case study.

Students words will vary, but their response needs to reflect the content in the sample answer provided below.

To:	<i>Wi Zhanf, Chief Finance Office</i>
From:	<i>Trish Gibbons, Project Officer</i>
Date/time:	<i>Tuesday, 9:00 a.m.</i>
Subject:	<i>Supplier Recommendation</i>
Attachments:	<<Add the name of any attachments here (leave blank if none)>>
<p><i>To Wi,</i></p> <p><i>I am sending you this email to inform you of the results of my analysis on the shortlisted supplier for each project and provide you with my recommendations on which supplier we should choose and why.</i></p>	

*For the **Customer Service Software**, the shortlisted suppliers' scores were the following:*

- *XYZ Software: 40% Satisfactory*
- *GEN X Software: 75% Very Good*
- *We serve you Software: 100% Excellent*

*I would recommend selecting "We serve you software" as the supplier for the Customer Service software as the XYZ customer service software has only been operating for 12 months, and cloud-based storage is not included in the price, and "Gen X software" has average client reviews and the cloud-based storage is also not included in the price.*

*For the additional **Melbourne office project**, the shortlisted suppliers' scores were the following:*

- *Browns Office Rentals: 45 % Satisfactory*
- *Melbourne Town Real Estate: 75% Very Good*
- *Commercial Real Estate: 100% Excellent*

*I would recommend selecting Commercial Real Estate as the Melbourne Town Real Estate does not include car parking, and Browns Office Rentals has very limited stock, only 10 car parking spots available, and the lease is only for 3 years.*

*Kind regards*

*Trish Gibbons*

*Accounts Officer/Project Officer*

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

[www.cbsa.com.au](http://www.cbsa.com.au)



## Task 2

### Case study

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

Good morning Trish,

Now that you have a preferred supplier for Project 1, please arrange a meeting to establish the agreed terms and conditions we will use going forward.

After the meeting, please develop a draft Goods and Service Contract based on project requirements and the agreed terms and conditions as discussed.

Would you please use aspects of the Goods and Service Contract for Project 1 and update me about the results by the close of business next Thursday?

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](http://www.cbsa.com.au)



- a) Participate in the **role play** about the customer service software project, where you will finalise procurement agreements with the selected supplier of the customer service software project.

In your role play, you must conduct a meeting with the selected supplier for the software provider for the customer service software project. In the meeting, you will discuss the terms and conditions with the preferred supplier using appropriate communication.

During the role play, your assessor will be looking to see that you can demonstrate the following:

- contribute to establishing agreed terms and conditions with the preferred supplier
- assist in developing Goods and Services contractual documentation
- participate in verbal exchanges using clear language and appropriate non-verbal features to provide and seek information
- use questioning and listening skills to check and confirm understanding
- discuss and confirm that the Customer Service Program is for 50 users and that there are free upgrades and web-based training. The installation fee and the yearly subscription should match the profile summary of the supplier provided in Task 1.
- confirm installation price and a yearly subscription to be paid in 1 instalment yearly on the 10 of June.

**Assessor instructions:** The student is required to demonstrate that they can conduct a meeting through a role play to discuss and agree on terms and conditions. The student must discuss and establish the agreed terms and conditions with the preferred supplier in the meeting.

During the role play, the student must be able to demonstrate that they can:

- be able to demonstrate that they can contribute to establishing agreed terms and conditions with you as the preferred supplier
- assist in developing Goods and Services contractual documentation
- participates in verbal exchanges using clear language and appropriate non-verbal features to provide and seek information
- uses questioning and listening skills to check and confirm understanding
- discuss and confirm that the Customer Service Program is for 50 users and that there are free upgrades and web-based training. The installation fee and the yearly subscription should match the profile summary of the supplier provided in Task 1
- confirm installation price and a yearly subscription to be paid in 1 instalment yearly on the 10 of June.

### Role play instructions

In this task, you will participate in a role/play meeting with one (1) other. These may be sourced using one of the following options:

- peers you are already working with within the industry your qualification relates to.
- fellow students who will play the role of the stakeholders. Please contact your fellow students via the Discussion Forum and coordinate your role play with them directly.

The role play/meeting must not exceed 15 minutes in duration and must address all elements of the Observation Checklist below.

If you are unable to find participants to play the role of the other team members, contact your assessor via the Discussion Forum, who will discuss options for pairing up with other students to complete this task.

#### Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, 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.

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

#### Option 2: Fellow student participants

Fellow students 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.

Students 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.

#### Participants' briefing instructions:

**Supplier:**

- **Background**

You will need to provide the participant with the details of the supplier you decided to select. You will need to give information about the company, the product, the price and any specific requirements you identified in Task 1.

The participant that will play the role of the supplier should:

- Agree with the terms and conditions the student will establish
- Participate in verbal exchanges with the student and answer any questions based on the information he /she is provided with
- confirm their understanding of the terms and conditions of the contract
- Confirm that the Customer Service Program is for 50 users and that there will be free upgrades and web-based training.

**Recording instructions**

Your role play must be recorded with all participants 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 participants 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 with 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 limit.

Include this recording as part of your assessment submission.

**ASSESSOR OBSERVATION CHECKLIST**

Students are required to upload a video of themselves, and one (1) other is engaged in a short meeting.

The participants must be fully briefed as outlined in the role play instructions.

The meeting should be a maximum of 15 minutes.

Students must demonstrate each of the performance criteria outlined in the observation checklist below.

ACTIVITY	SATISFACTORY YES / NO	ASSESSOR COMMENTS		
----------	--------------------------	-------------------	--	--

**Task checklist**

Did the student:				
<ul style="list-style-type: none"> <li>• contribute to establishing agreed</li> </ul>				

terms and conditions with the preferred supplier				
<ul style="list-style-type: none"> <li>assist in developing Goods and Services contractual documentation</li> </ul>				
<ul style="list-style-type: none"> <li>discuss and confirm that the Customer Service Program is for 50 users and that there are free upgrades and web-based training.</li> </ul>				
<ul style="list-style-type: none"> <li>Confirm installation price and a yearly subscription to be paid in 1 instalment yearly on the 10 of June.</li> </ul>				
<b>Skills checklist</b>				
Did the student discuss and develop strategies that include:				
<ul style="list-style-type: none"> <li>participate in verbal exchanges using clear language and appropriate non-verbal features to provide and seek information</li> </ul>				
<ul style="list-style-type: none"> <li>use questioning and listening skills to check and confirm understanding</li> </ul>				

b) After the completion of the meeting, develop a **Terms and Conditions Contract** draft based on project requirements and the agreed terms and conditions using the template below. Before you fill out the template, access and review the **CBSA Goods and Service Contract** to finalise the procurement requirements.

**Assessor instructions:** The student is required to develop a contract based on their selected supplier.

A sample answer is provided below. Students' information will be different based on the supplier they chose and the terms they agreed upon during the meeting. However, their responses will need to align with what was discussed during their meeting, as well as the information they collected during the previous assessments.

The student must be able to demonstrate that they can write a terms and conditions contract for the customer service software. They must use aspects of the CBSA Goods and Service Contract to finalise the procurement requirements. As a minimum, they must include:

- The supplier
- Commencement Date
- Expiry Date
- What they are purchasing

*Goods and services contract from CBSA is documented below:*

<p style="text-align: center;"> <b>AGREEMENT made on 1 July 2021</b>  <b>BETWEEN:</b>  <b>Complete Business Solutions Australia [CBSA] [‘the Purchaser’]</b>  <b>AND:</b>  <b>We serve you software [‘the Supplier’]</b> </p>	
Agreement Details	
Purchaser	<i>CBSA</i>
Supplier	<i>We serve you software.</i>
Commencement Date	<i>1 July 2021</i>
Expiry Date	<i>10 July 2021</i>
Supplier’s ABN	<i>8899773322</i>
Contract Managers	<i>Wi Zhang CBSA</i>
Details of Goods/Services	<i>Customer Service Program for 50 users with free upgrades and web-based training.</i>
Delivery Date	<i>15 July 2021</i>
Installation Date	<i>N/A</i>
Warranty Period	<i>N/A</i>
Reports and Manuals	<i>N/A</i>
Milestone Dates	<i>Shortlist provided by 15 July 2021</i>
Price and Payment	<i>\$235,000 installation fee</i> <i>\$5,000 yearly subscription</i> <i>Free upgrades and Web-based training</i>
Insurances	
Liability Limit	
Other Termination Rights	<i>N/A</i>
Approved Subcontractors	<i>N/A</i>
Additional Personnel Checks	<i>N/A</i>



Notice Period for Termination for Convenience	<i>12 months</i>
<b>Standard Terms and Conditions</b>	
<<Add relevant Standard Terms and Conditions from the Goods and Services Contract>>	

- c) Send an email to the selected supplier to finalise the agreement and advise them of the attached contract. In your email:
- Greet the supplier and thank them for meeting up with you
  - Advise them that the purpose of the email is to finalise the agreement according to what was discussed during your meeting
  - Let them know that the Terms and Conditions contract is attached to this email.

[Approximate word count: 50 – 100 words]

**Assessor instructions:** The student is required to send an email to their selected supplier to finalise the agreement. In their email, they will need to include all the information requested in the instructions above.

A sample answer is provided below.

To:	<i>We serve you software.</i>
From:	<i>Trish Gibbons [trish.gibbons@cbsa.com.au]</i>
Date/time:	<i>Tuesday, 9:00 a.m.</i>
Subject:	<i>Finalising terms and conditions for goods and services contract</i>
Attachments:	<<Add the name of any attachments here [leave blank if none]>>
<p><i>To "We serve you software",</i>  <i>Thank you for meeting up with me last week,</i>  <i>I am sending you this email to finalise our agreement, as discussed during our meeting.</i></p> <p><i>Please find the Terms and Conditions Contract attached.</i></p> <p><i>If there is anything you would like to discuss regarding the contract, please do not hesitate to contact me anytime.</i></p> <p><i>Kind regards</i>  <i>Trish Gibbons</i></p>	

*Accounts Officer/Project Officer*  
300 Fictional Way, Sydney, NSW 2000  
Phone: 1800 111 222  
[www.cbsa.com.au](http://www.cbsa.com.au)



### Task 3

#### Case study

Wi sent you the following email:

Good morning Trish,

Now that you have the preferred real estate agent for Project 2, please send them an email outlining the intention to finalise the specific terms and conditions. Then develop the terms and conditions we will use going forward.

Please use aspects of the Goods and Service Contract [available via the CBSA website] for Project 2.

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](http://www.cbsa.com.au)




- a) Using the Email Template below, prepare an **email** to the real estate agent that describes the intention to finalise the specific terms and conditions to source suitable additional offices in Melbourne.

**Assessor instructions:** The student must be able to demonstrate that they can prepare an email to the real estate agent that describes the intention to finalise the specific terms and conditions to source suitable additional offices in Melbourne.

Use the following email example as guidance for the requirements of the intention to finalise the specific terms and conditions.

A sample answer is provided below.

To:	<i>Commercial Real Estate</i>
From:	<i>Trish Gibbons [trish.gibbons@cbsa.com.au]</i>
Date/time:	<i>Tuesday, 9:00 a.m.</i>
Subject:	<i>Finalising terms and conditions for goods and services contract</i>

Attachments:	<<Add the name of any attachments here (leave blank if none)>>
<p><i>To Commercial Real Estate,</i></p> <p><i>Congratulations on being shortlisted as our preferred real estate agent to source our additional Melbourne Office. I would like to finalise our terms and conditions of your services that, include the following:</i></p> <ul style="list-style-type: none"> <li>▪ <i>office space for 15 staff in Melbourne CBD or inner Melbourne.</i></li> <li>▪ <i>car parking for 15 cars</i></li> <li>▪ <i>need to be sourced by 1 August</i></li> <li>▪ <i>can be furnished or unfurnished</i></li> <li>▪ <i>lease of five years plus and \$650 per week.</i></li> </ul> <p><i>Can you kindly confirm by next Tuesday that the above will be agreed to, and I will organise the terms and conditions to be written in the goods and services contract for you?</i></p> <p><i>Kind regards</i></p> <p><i>Trish Gibbons</i></p>	
<p><i>Accounts Officer/Project Officer</i></p> <p>300 Fictional Way, Sydney, NSW 2000</p> <p>Phone: 1800 111 222</p> <p><a href="http://www.cbsa.com.au">www.cbsa.com.au</a></p>	

- b) Using the template below, complete a **Terms and Conditions Contract** for the real estate agent to obtain additional offices in Melbourne. Before you fill out the template, access and review the **Goods and Services Contract** to finalise the procurement requirements.

**Assessor instructions:** The student must be able to demonstrate that they can write a terms and conditions contract for the real estate agent. They must use aspects of the Goods and Service Contract to finalise the procurement requirements.

Student answers will vary according to which aspects are used from the CBSA Goods and Services contract.

<p><b>AGREEMENT made on 1 July 2021</b></p> <p><b>BETWEEN:</b></p> <p><b>Complete Business Solutions Australia [CBSA] ['the Purchaser']</b></p> <p><b>AND:</b></p> <p><b>Melbourne commercial lease company ['the Supplier']</b></p>	
<b>Agreement Details</b>	
Purchaser	<i>CBSA</i>
Supplier	<i>Melbourne commercial lease company</i>
Commencement Date	<i>1 July 2021</i>
Expiry Date	<i>10 July 2021</i>

Supplier's ABN	<i>8899773322</i>
Contract Managers	<i>Wi Zhang CBSA</i>
Named Persons	<i>Joan Fletcher</i>
Details of Goods/Services	<i>Provide four office lease options for 15 staff and car parking [15 spots] n Melbourne CBD or inner suburbs.</i>
Delivery Date	<i>15 July 2021</i>
Installation Date	<i>N/A</i>
Warranty Period	<i>N/A</i>
Reports and Manuals	<i>N/A</i>
Milestone Dates	<i>Shortlist provided by 15 July 2021</i>
Price and Payment	<i>Lease \$650 per week.</i>
Insurances	<i>Building insurance and public liability insurance are to be included in the lease, and contents insurance is to be covered by CBSA.</i>
Liability Limit	<i>Building insurance [as per the value of the building] \$20 million public liability insurance, contents \$500K insurance.</i>
Other Termination Rights	<i>N/A</i>
Approved Subcontractors	<i>N/A</i>
Additional Personnel Checks	<i>N/A</i>
Notice Period for Termination for Convenience	<i>12 months vacate notice by the landlord</i>
<b>Standard Terms and Conditions</b>	
<<Add relevant Standard Terms and Conditions from the Goods and Services Contract>>	

## Task 4

### Case study

Wi sent you the following email:

Good morning Trish,

Thank you for your hard work assisting Con Kafatos in selecting the preferred supplier for the new customer service software project and a preferred real estate agent for the establishment of our new office in Melbourne. I would also like to thank you for finalising agreements on procurement terms and conditions with suppliers and for drafting the goods and service contracts based on our requirements for both projects.

I would now like you to complete the attached matrix to document stakeholders' roles and responsibilities for our next project meeting.

Feel free to add any additional roles should you consider needed.

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](http://www.cbsa.com.au)



In this part, you are required to establish and document the roles and responsibilities of the stakeholders during each of the two CBSA's projects implementation. More specifically:

- You will do this using the procurement requirements completed in Assessment Task 2.
- You will need to follow the requirements outlined in CBSA Chief Finance Officer's email below using the **Procurement tasks and stakeholders roles and responsibilities matrix templates** below.
- Complete the matrix documenting the relevant personnel, and the various procurement tasks required to establish and check the relevant stakeholders perform agreed terms.
- Feel free to add any additional roles.
- You are required to complete a matrix for both of the CBSA projects.

**Assessor instructions:** The student must be able to demonstrate that they can develop a procurement project roles and responsibilities matrix to be able to demonstrate that they can plan, organise and implement various tasks required to achieve the outcomes according to organisational requirements. The student must use the information from the procurement requirements completed in Assessment 2, identify the various project and stakeholder roles and responsibilities, and complete the matrix documenting the relevant personnel and the various procurement tasks required to establish and check the relevant stakeholders perform agreed terms. The student is required to complete a matrix for each of the CBSA projects.

Students are required to complete the roles and responsibilities matrix using the template provided. Use the following examples as guidance.

▪ *Procurement Tasks and Stakeholders Roles and Responsibilities Matrix 1*

PROCUREMENT TASKS AND STAKEHOLDER ROLES AND RESPONSIBILITIES MATRIX							
Project 1: Customer Service Software							
Roles and responsibilities	Draft tender documents and advertise	Establish criteria for shortlisting	Develop agreed terms	Monitor the agreed terms and deliverables	Pay for invoices	Monitor (e.g. time frames of contract terms)	Check contract terms and progress
Project manager (all aspects of the project)	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i> <i>For approvals</i>	<i>Accountable</i> <i>Weekly project meetings and meeting with the IT manager and supplier</i>	<i>Accountable</i> <i>Weekly project meetings and meeting with the IT manager and supplier</i>
Project officer (all aspects of the project)	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible for checking project schedule against tasks</i>	<i>Responsible</i> <i>Check project schedule daily</i> <i>Provide report weekly</i>
Project support officer				<i>Responsible</i>	<i>Responsible</i> <i>Processing invoices</i>		<i>Responsible</i> <i>Check payment</i>
<i>IT manager</i>	<i>Consulted</i>	<i>Consulted</i>	<i>Consulted</i>			<i>Consulted</i>	<i>Responsible for checking timeframes for installation</i>
<i>Finance manager</i>					<i>Consulted</i>		
<i>Sales and marketing</i>	<i>Consulted</i>	<i>Consulted</i>	<i>Consulted</i>				
<i>Training Manager</i>	<i>Consulted</i>	<i>Consulted</i>	<i>Consulted</i>	<i>Consulted</i>	<i>For approval</i>		<i>Responsible</i> <i>Check training schedule for training weekly</i>

▪ *Procurement Tasks and Stakeholders Roles and Responsibilities Matrix 2*

PROCUREMENT TASKS AND STAKEHOLDER ROLES AND RESPONSIBILITIES MATRIX							
Project 2: Additional Office Melbourne							
Roles and responsibilities	Draft tender documents and advertise	Establish criteria for shortlisting	Develop agreed terms	Monitor the agreed terms and deliverables	Pay for invoices	Monitor (e.g. time frames of contract terms)	Check contract terms and progress

Project manager (all aspects of the project)	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i>	<i>Accountable</i> <i>Ensure the office is available on the due date with the agent</i>	<i>Accountable</i>
Project officer (all aspects of the project)	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>
Project support officer			<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	<i>Responsible</i>	
<i>Lawyer</i>	<i>Consulted</i>	<i>Consulted</i>	<i>Consulted</i>				
<i>Finance manager</i>			<i>Consulted</i>	<i>Consulted</i>		<i>Responsible for payment</i>	
<i>Supplier</i>							<i>Responsible for providing office in the timeframe.</i>

### Assessment checklist:

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

1	Task 1: - Evaluation Criteria templates[2] - Email	<input type="checkbox"/>
2	Task 2: - Role play - Terms and Conditions Contract [Project 1] - Email	<input type="checkbox"/> <input type="checkbox"/>
3	Task 3: - Email - Terms and Conditions Contract [Project 2]	<input type="checkbox"/> <input type="checkbox"/>
4	Task 4: Procurement Tasks and Stakeholder Roles and Responsibilities Matrices [2]	<input type="checkbox"/>



**Congratulations, you have reached the end of Assessment 3!**

© RTO Advice Group Pty. Ltd. as trustee for RTO Trust (ABN 88 135 497 867) t/a Eduworks Resources 2021  
They reproduced and modified under license by UP Education Online Pty Ltd.

### © UP Education Online Pty Ltd 2021

Except as permitted by the copyright law applicable to you, you may not reproduce or communicate any of the content on this website, including files downloadable from this website, without the permission of the copyright owner.