



BSBPMG540

ASSESSOR GUIDE

MANAGE PROJECT INTEGRATION

Assessment 3 of 12

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 and 12

This assessment task 3 requires you to:

- **Monitor a project**

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 Management Plan (developed in Assessment Task 2)
- E-mail template (provided in the assessment)
- Project Status Report Template (attachment)
- Change Request Template (attachment)
- Project Issues Register (attachment)

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): Monitor project

Case study: You work as a Project Manager, Billy Walsh, for Complete Business Solutions Australia [CBSA]. You have received the following e-mails from Sally Pierce, Personal Assistant and Gavin Stead, Managing Director.



To: Billy Walsh [Billy.walsh@cbsa.com.au]
From: Sally Pierce [sally.pierce@cbsa.com.au]
Date/time: Monday 11.15 a.m.
Subject: Venues

Good morning Billy,

I've contacted all the identified venues for the conference to get quotes on venue hire and catering. While some are perfect for our needs, most are way over our budget or unavailable in early October.

I think we're going to need to compromise our standards a little bit. I can get us into a local RSL Club, but they don't generally do corporate-level conferences. They can do some sandwiches and meat platters during the day or provide vouchers to their café. They also recommended a BBQ-type event afterwards in their beer garden.

They can fit us in on the date we want, and they can come in under budget.

The other option is to go with the Five Seasons Hotel Conference Centre. They have exceptional facilities and can provide all the catering at the standard we want, but the costs will be significantly over our budget.

Apparently, they are quiet in November and could do us a better deal if we move the conference back a month.

Can we discuss this further?

Kind Regards,

Sally Pierce

Personal Assistant

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



To: Billy.walsh@cbsa.com.au
From: gavin.stead@cbsa.com.au
Date/time: Monday 11.25 a.m.
Subject: Small Business Conference Project
Attachment: Project Status Report.docx, Project Log Register.docx, Change Request Form.docx

Good morning Billy,

I've just had a brief chat with Sally about the venues, and I have some concerns about this situation. We're due to have a project team meeting tomorrow, so let's discuss it in more detail then.

I am meeting with the Board next Monday. Could you please have a **Project Status Report** prepared for the Board meeting? The report should incorporate our team progress meeting discussions.

I have also attached the Project Issues Register and a Change Request, should this be required.

Kind Regards,

Gavin Stead

Managing Director

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Attachment to e-mail:

- CBSA templates (attachment comprising of Project Status Report, Change Request, Project Issues Register, e-mail template)

Steps

Read the e-mails you have received and analyse the information about issues that have arisen. Compare this information with your Project Management Plan to determine how this may affect the project attaining its goals.

1. Facilitate a Project Team Meeting

Your assessor will play the role of Gavin Walsh, CEO, and a volunteer is required to play the role of Project Assistant.

The objective of this meeting is to discuss project progress and issues that have arisen. You will need to facilitate a resolution of any issues and determine actions to be taken to address identified issues or conflicts.

During the meeting project, team members will bring up issues or conflicts that may impact the projected attainment. You will be required to demonstrate your negotiation skills to resolve these issues and make decisions about actions to be taken. This will include a change to the project's scope.

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
- negotiating with others to achieve outcomes
- implement and monitor project according to project scope, time and budget
- Resolve conflict between team members about project issues to achieve objectives

Role play instructions

The role-play/meeting must include the assessor and one participant acting in the role of the Project Assistant, must not exceed 15 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. The other person participating in the role play may be resourced using one of the following options:

1. Peer/s who you are already working within 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 limit.

Include this recording as part of your assessment submission.

Note: For the following tasks, you must use AssNo3_CBSA templates (Project status report, change request, project issues register and e-mail)

2. **Develop Project status report**

After the meeting, prepare a **Project Status Report** using the template provided. The report should analyse the progress information provided to you by project team members during the meeting (and within the relevant e-mail).

3. **Develop change request**

After the meeting, you must prepare a **change request form** using the template provided. Ensure that your change request includes an impact analysis for any changes requested.

4. **Update the Project Issues Register**

Complete the **Project Issues Register** to document the issues identified during the meeting and the actions taken. Include timeframes, responsible parties and completion dates.

5. **Send an e-mail to the CEO**

Using the **e-mail template** provided, compose an e-mail to the CEO (for submission to the Board) to summarise the change request and submit the Progress Status Report and Project Issues Register. Your e-mail should indicate these documents are attached.

Submission instructions

Submit your assessment via the LMS.

Assessor instructions: Monitor project

Purpose of task

This part is designed to ensure that the student can prepare for a presentation based on organisational policies and procedures and the objective of the presentation.

Guidance to the 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. 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. Ensure the actor playing Sally has reviewed the e-mail she sent regarding venue issues.
- Set up a quiet space for the meeting
- Allocate 10-15 minutes for this meeting
- Ensure that the student has completed the final **Project Management Plan** prior to commencing this role play. (Task B)

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.
- 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.
- The Assessor (Gavin) must initiate a conflict about the cost and quality of the catering. Gavin must express concerns about the decisions made about catering, and it will not make good quality.
- Gavin has firm views about the quality of the venue and catering to be provided. The Board want the event to demonstrate that CBSA is a high-quality organisation, so all aspects of the event should demonstrate professionalism at a high level. He is not prepared to use a local RSL club as a venue.
- Gavin will come to some compromise. For example, the cocktail party part of the event could be downgraded – he would prefer that to any other quality downgrades of venues and the conference delivery.
- Other recommendations may be made as long as they do not 'rewrite' the PMP. These can be any area of the project to help facilitate the role play and provide reasonable adjustments or changes to the project scope.
- Agree to change of date to be moved to November – this will impact marketing. However, it is a higher standard of location, venue and catering. If necessary, ticket prices could be slightly increased to cover costs. Project timeline will be extended until November.

Sally Pierce [Volunteer]

- Sally is the Personal Assistant of the CEO (Gavin Stead).
- Sally has previously worked in an events business, so she has some experience organising event venues etc.

- Sally is concerned that the costs of venues are higher than what has been budgeted. She feels that 'corners will need to be cut' to make the conference viable financially. Sally made the decision that only water would be served to save money. Note to Sally [volunteer]: this will initiate conflict in a disagreement between Gavin Stead and Sally about costs.
- Sally must suggest the RSL club as option to save money but it is at a lower standard and there is no option for a cocktail event.

Billy Walsh [Student]

- Billy is the Project Manager.
- Billy is responsible for implementing the project.
- Billy is responsible for implementing the project
- Billy must resolve conflict affecting the attainment of project objectives and implement actions to resolve.

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 facilitate the discussion on project status/progress.
- State your issues as detailed in the role information.
- Ensure that Sally [actor] is also able to participate and present her conflicting views.
- Provide a conflicting view that catering needs to be of a high standard and saving money by only providing water is not acceptable.
- Encourage negotiation and agreement on adjustments.
- Request that Billy develops a Project Status Report for submission to the Board.
- Request that Billy develops a change request based on adjustments agreed upon in the meeting.
- Request that Billy updates the Project Issues Register accordingly.

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.

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.

2. Prepare a Project Status Report

- The assessor must check answers against the benchmarks and instructions provided in the attachment:

BSBPMG540_ASSESSOR_AssNo_3_CBSA Templates Benchmark

3. Prepare a Change Request

- The assessor must check answers against the benchmarks and instructions provided in the attachment:

BSBPMG540_ASSESSOR_AssNo_3_CBSA Templates Benchmark

4. Update Project Issue Register

- The assessor must check answers against the benchmarks and instructions provided in the attachment:

BSBPMG540_ASSESSOR_AssNo_3_CBSA Templates Benchmark

5. Compose an e-mail to the CEO

- The assessor must check answers against the benchmarks and instructions provided in the attachment:

BSBPMG540_ASSESSOR_AssNo_3_CBSA Templates Benchmark

Marking criteria: Monitor project

Assessment submission checklist

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

Monitor project		
1.	Role play evidence of team meeting of 10-15 minutes duration	<input type="checkbox"/>
2.	Project Status Report	<input type="checkbox"/>
3.	Change request	<input type="checkbox"/>
4.	Project Issues Register	<input type="checkbox"/>
5.	E-mail to CEO	<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]
1.	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"/>
	Implement and monitor the project according to project scope, time and budget Look for: <ul style="list-style-type: none"> monitored by listening and responding to stakeholders about project activities addressed concerns and conflict about budget and quality of catering 	<input type="checkbox"/>	<input type="checkbox"/>
	Resolve conflict between team members about project issues to achieve objectives Look for: <ul style="list-style-type: none"> listened to each stakeholder about their issues and concerns 	<input type="checkbox"/>	<input type="checkbox"/>

	<ul style="list-style-type: none"> sought a resolution that was agreed to by both parties 		
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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 2	The student submitted a Project Status Report , and all fields were completed according to the benchmark. Assessor to refer to assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
3.	The student submitted a Change Request , and all fields were completed according to the benchmark. Assessor to refer to assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
4.	The student submitted a project issues register , and all fields were completed according to the benchmark. Assessor to refer to assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
5.	The student submitted an e-mail , and all fields were completed according to the benchmark. Assessor to refer to assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>

Congratulations, you have reached the end of Assessment 3!



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