



BSBPMG540

ASSESSOR GUIDE

# MANAGE PROJECT INTEGRATION

## Assessment 4 of 12

Project



## 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 4 requires you to finalise the project:

- Part A: Identify and allocate project finalisation activities
- Part B: Final project report and feedback from project authorities

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 (Developed in Assessment Task 2)
- Project Management Plan (Developed in Assessment Task 2)
- Project Status Report (Developed in Assessment Task 3)
- Change Request (Developed in Assessment Task 3)
- Project Issues Register (Developed in Assessment Task 3)
- Email template
- Final Project Report Template

## 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: Identify and allocate project finalisation activities

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.



To: Billy.walsh@cbsa.com.au  
 From: gavin.stead@cbsa.com.au  
 Date/time: Monday 10.05 a.m.  
 Subject: Small Business Conference Project  
 Attachment: Budget Report.docx

Good morning Billy,

Tim Gibbons sent me the budget report for last week's conference. We need to make sure contractual requirements with suppliers have been fully met and finalised.

I understand that the cocktail event was cancelled at the last minute to try and save costs. However, it was not cancelled within 7 days so the \$8,000 invoice for the cocktail event still needs to be paid. Can you please follow up payment with the accounts department because I have already approved and forwarded the invoice to be paid. The contract stated that all invoices must be paid within 7 days.

Could you arrange to finalise all project activities, including providing a Final Report which I will present to the Board next week?

Kind Regards,  
 Gavin Stead  
 Managing Director  
 300 Fictional Way, Sydney, NSW 2000  
 Phone: 1800 111 222  
[www.cbsa.com.au](http://www.cbsa.com.au)



### Attachment to email:

- Budget Report

Budget Report			
<b>Project Name:</b>	CBSA Small Business Conference		
<b>Budgeted revenue</b>		<b>Received revenue to date</b>	
Registration fees	\$30,000	Registration fees	\$19,000
<b>Budgeted expenses</b>		<b>Committed expenses to date</b>	
Venue Hire	\$2,000	Venue Hire	\$2,000
Catering [during conference]	\$6,000	Catering [during conference]	\$3,000
Cocktail Party catering/bar	\$6,000	Cocktail Party catering/bar	

Entertainment – Cocktail Party	\$2,000	Entertainment – Cocktail Party	
Equipment Hire	\$3,000	Equipment Hire	\$2,000
Speakers	\$8,000	Speakers	\$12,000
Speaker Accommodation	\$1,500	Speaker Accommodation	\$1,600
<b>TOTAL</b>	<b>\$28,500</b>	<b>TOTAL to date</b>	<b>\$24,100</b>
<b>Profit/Loss</b>	<b>\$1,500</b>	<b>Profit/Loss</b>	<b>-\$1,600</b>

## Steps

Based on the requirements of the Project Management Plan and the CBSA Project Management Policy and Procedure, send an email to Project Team members to allocate project finalisation activities.

Complete the **email templates** using AssNo\_4\_CBSA templates including:

1. E-mail to the **accounts department** requesting them to pay \$8,000 invoice for cocktail event and when payment is required.
2. E-mail to the **venue speakers** thanking them for their participation and to ask for feedback to improve future projects.
3. E-mail to **Gavin Stead, Managing Director** to confirm that financial, legal and contractual obligations have been finalised and the actions you have taken in response to his e-mail.

## Submission instructions

Submit your assessment via the LMS.

## Assessor instructions Part A: Identify and allocate project finalisation activities

### Purpose of task

This part is designed to ensure that the student is able to identify and allocate project finalisation activities.

### Guidance to the assessor about the task

Use the assessor benchmark by referring to the attachment ASSESSOR\_Ass No 4\_CBSA templates.

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

## Marking criteria: Part A: Identify and allocate project finalisation activities

### Assessment submission checklist

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

Part A: Identify and allocate project finalisation activities		
1.	Email to accounts, venue speakers and managing director	<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 an email to the accounts department, venue speakers and Gavin Stead, and all fields were completed according to the benchmark. Assessor to refer to assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>

## Task instructions [for the student] Part B: Complete final report for submission to board

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



To: Billy Walsh [Billy.walsh@cbsa.com.au]  
From: Sally Pierce [sally.pierce@cbsa.com.au]  
Date/time: Wednesday 11.05 a.m.  
Subject: Small Business Conference Project

Good morning Billy,

As requested, I've put together a brief report based on the outcomes of last week's conference. Let me know if I can provide any further information.

### Overall outcome

The CBSA Small Business Conference went ahead as planned, with some changes to the event plan. We reduced costs in catering through negotiations with the venue and cancelled the cocktail party event to reduce expenses.

Ninety-five delegates attended the event.

The feedback from delegates was generally good; however, some dissatisfaction was noted regarding catering and the advertised entertainment for the cocktail event, which was ultimately cancelled.

The conference was held on the 16 October but came in well budget. I'm still finalising payment for some of the speakers and catering invoices.

The marketing team has converted some of the delegates into new customers. At this stage, they have appointments scheduled with 15 potential new business leads.

Overall, I think we did quite well given the circumstances, but next time I think we really need to think about how we will attract delegates more effectively.

Kind Regards,

Sally Pierce

Personal Assistant

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



To: Billy.walsh@cbsa.com.au  
From: Tim.Gibbons@cbsa.com.au  
Date/time: Wednesday 10.45 a.m.  
Subject: Small Business Conference Project

Hi Billy,

There has not been any significant change in the budget from the report Gavin sent you earlier this week.

I can confirm that all invoices have now been paid.

I think we did well to come close to the budget given the situation, but we were too optimistic about the interest the conference would receive. We need to make sure future conference budgets have more flexibility to allow for an uncertain number of delegates. We shouldn't lock all our plans around a number that may not eventuate.

Kind Regards,

Tim Gibbons

Accounts Officer

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



### Attachment to email:

- Project Charter Template.docx [provided below]

### Steps

To complete the following steps, use Ass No4\_CBSA templates.

Based on the email, complete the following tasks.

1. Review the emails you have received in both Task A, and Task B. Based on this information, complete the **Project Final Report** for submission to the board.
2. When you have completed the report, send an email to Gavin Stead to attach the report on project progress.

### Submission instructions

Submit your assessment via the LMS.

## Assessor instructions Part B: Complete final report for submission to board

### 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

Refer to BSBPMG540\_ASSESSOR\_AssNo\_4\_CBSA templates for benchmark guidance and instructions.

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.

## Marking criteria Part B: Complete final report for submission to board

### Assessment submission checklist

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



Part B: Complete final report for submission to board		
1.	CBSA template - Project Final Report	<input type="checkbox"/>
2.	CBSA template - Email to Gavin Stead	<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 the <b>final report</b> and completed all fields according to the benchmark. Refer to assessor guide_Ass No 4 CBSA templates	<input type="checkbox"/> S	<input type="checkbox"/> NYS
2.	The student submitted the <b>email</b> and completed all fields according to the benchmark. Refer to assessor guide_Ass No 4 CBSA templates	<input type="checkbox"/> S	<input type="checkbox"/> NYS

Congratulations, you have reached the end of Assessment 4!



© 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.