



BSBPMG540

ASSESSOR GUIDE

MANAGE PROJECT INTEGRATION

Assessment 6 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 6 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 **November 2022**.



To: Billy.walsh@cbsa.com.au
From: gavin.stead@cbsa.com.au
Date/time: Monday 10.05 am, 1 April 20XX
Subject: Project management support for small business
Attachment: Project Charter Template.docx

Good morning Billy,

Under the auspice of CBSA, we now have the availability to offer Project Management Support to small businesses as needed.

We have a new client wanting this service from us, and I would like to put you in charge as the Project Manager for this inaugural client. The business is known as **CupNBake**. CupNBake is a well-known chain of cafés in Sydney and Melbourne, and they have decided to open a smaller version of their larger shops in Canberra.

The Melbourne and Sydney Cafés have an attached onsite industrial bakery that produces all of their bread, pastries, pies and cakes onsite.

The café in Canberra will be based in Manuka. This version will **NOT** have the bakery on site. However, this café will receive all of the required bakery products from its own bakery based in Fyshwick (run by the same company – but at a different location).

We have been contracted to assist in the **fit-out** of the Café to be based in Manuka.

You have two **staff members** to assist you throughout the project.

- Kerry Adams - administration and personal assistant
- Michael Johnston - interior design and materials source

The basic details of the Manuka CupNBake café are:

- The café will be set up for 16 tables and chairs of up to 4 patrons each
- The café will be located inside a Marketplace Shopping Centre
- It will have an underground car park with a small cage storage unit
- Will have a long counter with display units of all the baked goods
- Bread racks will be located behind the counter, with a bread slicer nearby
- A large, specialised coffee machine will be to the right of the display units
- The space between the two will be the area where orders are placed
- There is a utility room behind the counter with additional storage– both refrigerated and cupboard.
- A small space will be allocated for staff in this area as well.
- A Café Manager has been appointed; his name is David. He is recruiting the remaining staff required for the opening.

The allocated budget for set up and fit out to opening is: \$95,000.00 (NOT inclusive of salaries of CBSA staff - will be invoiced separately to client)

Based on this information, please prepare a draft project charter. You will liaise directly with the Café owner, Shellie Webber, about the project details, expectations and timelines. I have arranged a meeting with Shelly and you next Monday, 7th November 2022, in the Conference Room at 10.30 am. This will help you to prepare for your meeting. You will obtain further details about the project at the meeting to help you prepare the Project Charter.

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 **BSBPMG540_Ass No 6_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 Shellie Webber, café owner** (your Assessor will play the role of Shellie)

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 Shellie Webber, café owner 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:

- Discuss your understanding of the project by referring to your draft Project Charter.
- Discuss, negotiate and seek clarification about project objectives, outcomes and benefits.

During the meeting, your assessor in the role of Shellie will propose a different viewpoint to that outlined in your Project Charter. You must 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. The purpose of asking the student to prepare a draft charter is to:

- help the student prepare for the meeting and understand the requirements of the project
- assist with the rules of evidence authenticity – the student has the knowledge and skills to prepare a project charter. In step 2, the student will participate in a role-play with the assessor to confirm the details of the 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 - CupNBake Cafe
Project Name:	Internal fit out to opening @ new Manuka site, Canberra
Project Manager:	Billy Walsh

Background [Word guidance: 20 to 30 words]
<<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.>>
Students are expected to summarise the information provided in the email in an applicable manner to provide adequate background on the project.
The student's words may vary, but their response must include:
Establishing internal fit-out and set up of CupNBake Café in Manuka, ACT.
CBSA assists small businesses with project management for the Client, CupNBake

Project objectives [Word guidance: 15 to 30 words]
<<Document specific and measurable objectives for the project.>>
Students are expected to summarise the information provided in the email, which will be clarified further in the meeting/role play. The objective must be specific and measurable.
At the Diploma level, a student's words may vary, but their response must include the following:
To establish internal fit-out and setup of CupNBake Café in Manuka, ACT by dd Month yy.
At the Diploma level, students may provide additional alternative responses and may include:

1. Meet timelines set by the Client
2. Meet the budget set by the Client
3. Meet build and fit out requirements as per client expectations

Project Benefits [Word guidance: 20 to 30 words]

<<Define the benefits the project will bring to the organisation and stakeholders.>>

Students are expected to summarise the information provided and consider the benefits this will bring to CBSA.

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

- 1. Boost reputation in a new area of business for CBSA*
- 2. For the café, expand into a new location, increasing profits.*

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: 8 to 30 words]

Students are expected to summarise the information provided and outline the key deliverables.

The student's examples may vary. The project deliverables will be confirmed during the meeting, and therefore, deliverables may include the following:

- Complete fit-out of the café based in Manuka*
Students may provide specific deliverables such as:
- Design of the layout is complete and approved*
- Materials sourced and approved*
- Contractors for internal build approved*
- Equipment sources and approved*
- Contractors and materials ordered*
- Equipment and installation ordered and arranged*
- Equipment installed*
- Internal design complete*
- Materials and furnishings complete*
- Inspection complete and passed*
- Final review and clean up for launch*

Key Stakeholders

<<Describe the proposed project governance structure according to the project management policy and procedures. >> [Word guidance: 35 – 45 words]

Students are expected to summarise the information provided and outline the key stakeholders (including internal and external).

Key stakeholders must include:

- Shellie Webber - Owner*
- Billy Mason - Project Manager*
- Kerry Adams - administration and personal assistant*
- Michael Johnston - interior design and materials source*
- Gavin Stead - MD, CBSA - Overseer*
- David - Café Manager*

Other stakeholders may include:

- Contact from the Marketplace Shopping Centre*
- Current and future CupnBake clients*
- Contractors*
- Suppliers*

<<Identify key decision-makers.>> [Word guidance: 6 to 15 words]

Students are expected to summarise the information provided and outline the key decision-makers.

Student responses must include the following:

- *Shellie Webber - Owner*
- *Billy Mason - Project Manager*
- *Gavin Stead - MD, CBSA*

Acceptable answers can consist of the name only.

Project Budget

<<Describe the project budget and main project expenses.>>

Students are expected to summarise the information provided and outline the budget and main expenses.

Student responses must include the following:

\$95,000

Student wording and examples may vary and must relate to the project specifics.

Inclusions:

Materials, equipment, contractors, labour, design, fit out, final inspection to open and launch, contingencies.

Main expenses:

Equipment:

Refrigerators

Display cabinets

Coffee Machine

Contractors - electricians, plumbers, tradespeople

Project Timelines

<<Outline project timelines.>>

The student must identify key timelines. The below is a guideline, and the student must include the main timelines. Here the student may make some assumptions about timelines to be clarified at the meeting. For example, the launch must be a project milestone.

*The launch is tentatively booked for **Saturday, 25th February 2023.***

Meeting with Client:

7th November 2022

Main timeline:

November 2022:

Brief Project team

Visit site

Liaise with Marketplace representative regarding access times etc.

Confirm equipment and design materials and resources

Order equipment and materials

Book contractors for installation

December 2022

Commence and complete interior design work, painting, flooring

Contractors prep for equipment installation - electrician and plumbers

Select and order serving equipment, seating and tables

January 2022

Major equipment installation and testing

Display cabinet build

Storage and cabinetry build

Inspection of build to date

February 2022

Testing of all equipment

Final decorating and interior design requirements complete

Delivery of all serving materials

Final inspection

Launch

2. Meeting with Shelley

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:

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

Shellie, Café owner [Assessor]

- Shelley is the café owner and must provide project details and feedback about the draft project charter and will participate in the project team to approve decisions throughout.
- Where required, Shellie must 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 Shellie, the café owner. 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 project's scope.
- Listen to the information provided by the student about the project.
- Communicate the following details through the first meeting:
 - **Project Budget: \$95,000**
 - **Inclusions:**
Materials, equipment, contractors, labour, design, fit out, final inspection to open and launch, contingencies.
 - **Exclusions:**
*Marketing and promotion
CBDA Project staff
Emergency contingencies*
 - **Project Timeline:**
 - You must facilitate a discussion to ensure the student can demonstrate their negotiation skills when discussing the project timeline.
 - When discussing the launch date, provide a very unrealistic date, such as within two weeks. Let the student respond to the unrealistic date and renegotiate a realistic date. The outcome of the negotiation will be to advise and agree on the key milestone date as Saturday, 25 February 2023.
 - The student must demonstrate skills to negotiate project objectives, outcomes and benefits with you and 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
 - **Resources/materials and Contractors:**
*To be arranged by CBSA Project Manager
Approval of materials to be approved by Shellie Webber*
 - **Project Team Members:**
*Shellie Webber - Owner
Billy Mason - Project Manager
Ask who else will be involved in the project at CBSA to ensure the student has identified Kerry Adams - administration and personal assistant, Michael Johnston - interior design and materials source, Gavin Stead - MD, CBSA - Overseer*
 - **Project Milestones:**
*Design of the layout is complete and approved
Materials sourced and approved
Contractors for internal build approved
Equipment sources and approved
Contractors and materials ordered
Equipment and installation ordered and arranged*

Equipment installed

Internal design complete

Materials and furnishings complete

Inspection complete and passed

Final review and clean up for launch

○ **Reporting:**

Shellie will be onsite daily to liaise and inspect operations

All communications are to be directly with Shellie

Weekly reporting will be expected, including information on the following:

- *Materials*
- *Resources*
- *Contractors*
- *Expected Outcomes*
- *Budget*

Fortnightly report to Gavin on overall Project management and timelines (a Work Breakdown Schedule format)

- Also, ensure that you discuss key project tasks with the student to enable them to identify key milestones and activities. This can be brainstormed by discussing key activities associated with the project.
- 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 update the Project Charter in Part B of the assessment.

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 when they observe the assessment 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"/>
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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 am.
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 [Ass No6_Part B-Project Management Plan Template]

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 meeting with the client and project team

Your assessor will play the role of Shellie Webber, café owner, and you will need to arrange for another student/peer to play the role of Kerry Adams, administration and personal assistant, who will assist you in the project. Gavin Stead is away and has asked to run the meeting without him.

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:

Case study: You have been asked to update the Project Management Plan based on the information provided. You also requested finance to provide you with information about costings, and you received the following email:

To:	Billy.walsh@cbsa.com.au
From:	Finance @cbsa.com.au
Date/time:	Friday 11.30 am.
Subject:	CupNBake Cafe

Good morning Billy,

As requested, please find attached the financials for the CupNBake Café project.

- Construction costs to cover design, painting, cabinetry, electrical and plumbing work are to be estimated at \$42,000
- Décor covering interior design, lighting, flooring, seating, tables and serving items to be estimated at \$9,400
- Machine and equipment, including espresso machine, grinder, fridge, dishwasher, ovens etc., \$26,200
- The total estimated budget is \$87,600

Let me know if you need any other information.

Kind Regards,

Finance Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au



Note: For this assessment, ensure you submit both the draft and final Project Management Plan.

4. You have received the following email and invoice for machinery and equipment.

To: Billy.walsh@cbsa.com.au
From: catersupplies.com.au
Date/time: Monday 11.30 am.
Subject: Machinery & equipment invoice

Good morning Billy,

Please find attached the invoice for the machinery and equipment. As discussed, the bakery has a contract to purchase beans through our company, so the two coffee machines are provided for free. I have not charged you \$10,000 for the coffee machines.

Let me know if you need any other information.

Kind Regards,

Cater Supplies

30 Caterer Way, Sydney, NSW 2000

www.catersupplies

INVOICE

Attention:
Billy Walsh
CBSA

Email: billy.walsh@cbsa.com.au

Invoice Number: 110934
Date: 15 November 2022
Payment terms: 7 days

<u>Item</u>	
Supply of equipment and materials for Maunuka bakery inc GST	\$16,200
Total	\$16,200

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 develop and negotiate the project management plan.

Guidance to assessor about the task

1. Prepare a draft Project Management Plan

Project Management Plan

Project Sponsor	CBSA
Project Name:	CBSA - CupNBake Cafe
Project Manager:	Internal fit out to opening @ new Manuka site, Canberra

Background/Context:

<<Provide a brief explanation of the background and/or context of the project. >> Word guidance: 12 to 25 words

Benchmark

Students must summarise the information provided in the email in an applicable manner to provide adequate background on the project.

Example:

Establishing internal fit-out and set up of CupNBake Café in Manuka, ACT.

CBSA assists small businesses with project management for the Client, CupNBake

Objective:

<<What is the aim of this project?>> Word guidance: 25 to 50 words

Benchmark

Students must summarise the information provided in the email and the information from the client established in the meeting/role play:

Example: can be more detailed based on the role/play information provided.

1. Meet timelines set by the Client

2. Meet the budget set by the Client

3. Meet build and fit out requirements as per client expectations

Target Outcomes: Word guidance: 15 to 20 words

<<Benefit that the project intends to achieve.>>

Students must list the actual outcome that is required to meet the needs of the Project delivery

Benchmark

Example: *can be more detailed based on the role/play information provided.*

- 1. Deliver the build and internal fit out of the Café as determined by the Client*
- 2. Deliver the project within the budget set by the client*
- 3. Deliver the build and internal fit-out of the Café within set timeframes and by the current Launch date of 25th February 2023.*

How the success of the project will be measured: Word guidance: 15 to 20 words

<<Describe the measure[s] that will be used to indicate that the project has been successfully completed.>>

Benchmark

Students must detail their measurable outcomes.

Answers must include:

- Fit-out completed by 25 February 2023*
- Fit-out completed within budget and quality standards*

Project Scope and constraints: Word guidance: 120 to 150 words

<<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.>>

Benchmark

Students must detail the scope of the project, its inclusions and exclusions and assumptions:

Example:

This project will assist the client in designing and completing the internal fit-out of the new café in Manuka, Canberra.

Inclusions:

- Design of layout*
- Materials sourced and approved*
- Contractors for internal build*
- Equipment sourced and approved*
- Contractors and materials ordered and booked*
- Equipment and installation ordered and arranged*
- Equipment installed*
- Internal design complete*
- Materials and furnishings complete*
- Inspection complete and passed*
- Final review and clean up for launch*

Exclusions:

- *Contingency plans*
- *External shop front design*
- *Signage*
- *Staff and Training*
- *Legislative requirement of building and constructions [responsibility of Contractors]*

Assumptions:

- *Access to the site is available 7 days per week, 06:00 am -7:00 pm*
- *Material delivery access straight to the shop front or storage in the parking area as designated*
- *Café Owner and or Project Manager on site each day*
- *Materials ordered will face potential delay due to the time of year [Christmas period]*

Project Stakeholders:

<<Provide a list of project stakeholders, detailing governance structure and project team roles and responsibilities.>> Word guidance: 50 to 55 words

Benchmark

Students must detail all relevant Stakeholders from the information provided to date:

Example:

Governance structure

Project Manager, Project Sponsor, Owner

Internal Stakeholders

1. *CBSA Management*
2. *Café Owners*
3. *Café Manager*
4. *Project Team*

External Stakeholder

1. *Suppliers - for build and also for menu items for Cafe*
2. *Electrician*
3. *Construction tradespersons*
4. *Plumber*
5. *Distributors*
6. *Marketplace Management*
7. *General Public*
8. *Competitors*
9. *Customers*

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.>>

Students must detail a brief outline paragraph of the milestones expected as listed in the project:

Example:

The following milestones list the key deliverables within this project to ensure the project plan timeline and objectives are being met efficiently, professionally and appropriately.

Examples below. *Students may provide slight variances to the following. Milestones must be relevant to the project integration and include key phases.*

Milestone	Description	Date
Benchmark Project initiation	<i>Meeting with the client, details obtained for all aspects of the project Site visit, if appropriate, for confirmation of requirements and planning</i>	<i>7th November</i>
Project Charter Finalised	<i>Finalisation and approval of Project Charter</i>	<i>11th November</i>
Project Management Plan Finalised	<i>Finalisation and approval of PMP</i>	<i>15th November</i>
Contractors sourced	<i>Contractors sourced for various types of building and installation components of the project, including but not limited to: Builders Plumbers Electricians Cabinet makers Barista installers Glaziers</i>	<i>25th November</i>
Materials sourced	<i>Materials for build requirements sourced and ordered.</i>	<i>30th November</i>
Equipment ordered	<i>Equipment for café ordered</i>	<i>30th November</i>
Fit-out and finalisation activities complete	<i>All works completed and handover done</i>	<i>30th November</i>

Milestone Change requirements:

<<Include a text section that discusses actions taken if any changes to the milestones or delivery dates are required.>> Word guidance: 50 to 60 words

Students must detail a brief outline of how changes to the milestone requirements will be managed:

Benchmark

Example:

Should there be a requirement to change an element of the milestones from the original approved PMP, then the following process will be followed:

- *Change request form completed*
- *Liaison with Café Owner*
- *Alternate plans discussed and outlined in the paperwork*
- *CBSA MD notified*
- *Approval gained; alternate plan put in place*
- *Update the PMP as needed*

Work Breakdown Structure and dependencies:

<<Develop a WBS that will enable effective planning and control of the project. You may choose any format to present the WBS. It may be in the form of a diagram or a list of activities, but it must contain sufficient detail to enable a Project Schedule to be developed from it.>>

<<Identify task dependencies. You may include these in your WBS or document them in text format.>>

Benchmark

Students must detail a WBS in their chosen format to effectively outline the planning and control of the project:

Example:

- *Café Fit out and Design:*
 - *Internal*
 - *Selection of materials, pallets and colours*
 - *Contractors:*
 - *Electricity*
 - *Rough-in electrical*
 - *Install and terminate*
 - *Lighting*
 - *Equipment connections*
 - *Override emergency shutdown switch*
 - *Plumbing*
 - *Rough-in plumbing*
 - *Set plumbing fixtures required general and specific*
 - *Test and clean*
 - *Painters*
 - *Paint walls*
 - *Hang wallpaper*

Project Management Plan

- *Internal Cabinetry:*
- *Masonry/Tiling Work*
 - *Build display cabinets*
 - *Build Countertops*
 - *Build Storage*
 - *Tiling in wet areas*
 - *Main flooring install*
 - *Ceiling decals/details*
- *Building Finishes*
 - *Hang wallpaper*
 - *Hardware*
- *Equipment installation*
 - *Barista machine set up and install*
 - *Refrigeration set up and install*
 - *Food warming ovens set up and install*
 - *EFTPOS set and install*

Change Management:

Identify change management process. Word guidance: 50 to 60 words

Students must identify change management process.

Should there be a requirement to change an aspect of the project from the original approved PMP, then the following process will be followed:

- *Change request form completed*
- *Liaison with Café Owner*
- *Alternate plans discussed and outlined in the paperwork*
- *CBSA MD notified*
- *Approval gained; alternate plan put in place*
- *Update the PMP as needed*

Project monitoring:

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

Monitor expenditure against budget and task completion against tasks allocated using a GANTT chart.

Project Communications:

Communication type	Description	Who	Scheduled start	Scheduled finish
Benchmark <i>Weekly progress report</i>	<i>Overview of the project against the WBS and Milestones</i>	<i>Project Manager</i> <i>Project team</i>	<i>Start date</i>	<i>Finish date</i>

Project Management Plan

<i>Weekly Status report</i>	<i>All reports, plan and revisions of project documents are to be provided</i>	<i>Project Manager Project team</i>	<i>Start date</i>	<i>Finish date</i>
<i>Project progress report</i>	<i>Review the project kick-off and project plan document, including budget, schedule and scope.</i>	<i>Project Manager Project team</i>	<i>Start date</i>	<i>Finish date</i>
<i>Daily Report</i>	<i>Daily progress and status updates</i>	<i>Project Manager Project team</i>	<i>Start date</i>	<i>Finish date</i>

<<Add or delete rows as required.>>

Project Budget:

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

Costings must match the following information:

Cost area	Details	Estimated cost
<i>Construction Cost</i>	<i>Includes design, painting, cabinetry, electrical and plumbing work</i>	<i>\$42,000</i>
<i>Décor</i>	<i>Interior décor selection, including lighting, flooring, seating, tables and serving items</i>	<i>\$9,400</i>
<i>Machine & Equipment</i>	<i>Espresso machine & grinder, fridge, dishwasher, ovens etc</i>	<i>\$26,200</i>
<i>Miscellaneous</i>	<i>Delays, damage, contingency</i>	<i>\$10,000</i>

Project Management Plan

	<i>Total</i>	<i>\$87,600</i>
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<<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.>>

Likelihood	Consequences				
	Insignificant <i>Risk is easily mitigated by normal day to day process</i>	Minor <i>Delays up to 10% of Schedule Additional cost up to 10% of Budget</i>	Moderate <i>Delays up to 30% of Schedule Additional cost up to 30% of Budget</i>	Major <i>Delays up to 50% of Schedule Additional cost up to 50% of Budget</i>	Catastrophic <i>Project abandoned</i>
Certain >90% chance	High	High	Extreme	Extreme	Extreme
Likely 50% - 90% chance	Moderate	High	High	Extreme	Extreme
Moderate 10% - 50% chance	Low	Moderate	High	Extreme	Extreme
Unlikely 3% - 10% chance	Low	Low	Moderate	High	Extreme
Rare <3% chance	Low	Low	Moderate	High	High

Risk	Likelihood	Severity	Treatment/control methods
Benchmark <i>Materials or Equipment delay</i>	<i>Moderate</i>	<i>Major</i>	<i>Order early with resource planning to avoid</i> <i>Have local sources available if occurs to avoid build delay</i>
<i>Inclement Weather</i>	<i>Unlikely</i>	<i>Minor</i>	<i>Ensure the internal of the café is protected from weather</i>
<i>Power Failure</i>	<i>Unlikely</i>	<i>Major</i>	<i>Back-up generators on standby should this occur to continue business without interruption</i>

Project Management Plan

<i>Contractor unavailability</i>	<i>Moderate</i>	<i>Major</i>	<i>Alternate sources available</i> <i>Build delay time into the schedule to balance out</i>
<i>Communications</i>	<i>Unlikely</i>	<i>Moderate</i>	<i>Open and clear communication among the team</i> <i>Daily meetings to delegate tasks</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.

Shellie, Café owner [Assessor]

- Shelley is the café owner and needs to approve the project management plan.
- Shelley must agree to and approve the project management plan.
- Shelley 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, Shelley 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.

Kerry Adams (Volunteer – Administration and personal assistant)

- Kerry is the administration and personal assistant
- Kerry can raise any ideas/concerns/suggestions about items related to the project
- The idea here is not to 'pull apart' the PMP but to offer ideas for adjustment. Ensure suggestions are realistic and reasonable.

Billy Walsh (Student)

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

During the meeting

You will act as Shellie, the Café owner. 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 Kerry Adams (volunteer) 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"/>
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Congratulations, you have reached the end of Assessment 6!



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