



BSBPMG540

ASSESSOR GUIDE

# MANAGE PROJECT INTEGRATION

## Assessment 7 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 and 12

### This assessment task 7 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 6)
- Email 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-mail from Michael Johnston, Interior Design and Materials Source Officer and Gavin Stead, Managing Director.

To: Billy.walsh@cbsa.com.au  
From: Michael.johnston@cbsa.com.au  
Date/time: Monday 9:00 a.m, 1 April 20XX  
Subject: CupNBake Costings

Good morning Billy,

Here is my weekly update:

- The following contractors have been sourced: builders, plumbers, glaziers and electricians
- Onsite meetings are booked with all contractors to order and confirm materials
- Cabinet makers and barista installers are delayed.

I have not been able to source cabinet maker and barista installer contractors for work that was meant to commence on 28 November. There is a shortage of cabinet makers and barista installers due to COVID.

As a result, the launch date will need to be deferred by 8 weeks or we will have to pay a premium price to attract an installer to do the work immediately. The additional cost is \$10,000.

Please let me know what action is required.

Kind Regards,

Michael Johnston

Interior Design and Materials Source Officer

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: gavin.stead@cbsa.com.au  
Date/time: Monday 11.25 a.m.  
Subject: CupNBake Cafe Project  
Attachment: Project Status Report.docx, Project Log Register.docx, Change Request Form.docx

Good morning Billy,

We had a brief chat about some of the issues with the CupNBake Café Project. I have some concerns about this situation. We need to be able to provide project management support for small business and the timing and costing situation needs to be sorted.

Let's chat about the tasks that have been completed to date. After our meeting, prepare a **Project Status Report**. I have a Board meeting next week and they are keen to hear about the project management support for small business.

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



### Attachment to email:

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

### Steps

Read the emails 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, CBSA.

The objective of this meeting is to discuss project progress and issues of not being able to source contractors to commence work on 28 November.

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, you will need to discuss the issue or conflict of not 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. Negotiate the objectives, outcomes and benefits by discussing how the issue of contractors could be resolved or changes required.

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 will include your assessor in the role of Gavin Walsh, CEO and must not exceed 15 minutes duration and must address all elements of the Observation Checklist below. Contact your assessor to organise a suitable time.

Note: For the following tasks, you must use AssNo7\_CBSA templates (Project status report, change request, project issues register and e-mail)

2. **Develop Project status report**

After the meeting, you will be required to 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 email).

3. **Develop change request**

After the meeting, you will be required to 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 email to the CEO**

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

6. You have received the following e-mail and invoice for machinery and equipment.

Monitor the expenditure of the project by updating the **Budget Report** with the committed expense to date resulting from the information provided.

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

Good morning Billy,

Please find attached invoice for machinery and equipment. As discussed, CupNBake has signed a contract to purchase coffee beans through our company and this means that the two coffee machines have been 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](http://www.catersupplies)

## INVOICE

**Attention:**

**Billy Walsh**

**CBSA**

**E-mail :** billy.walsh@cbsa.com.au

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

Item

Supply of equipment and materials for Maunuka bakery inc GST  
\$16,200

Total

**\$16,200**

### 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 implement and monitor the project including resolving conflict and updating project records.

#### 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 each role.
- 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 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.
- As a result, the launch date will need to be deferred by 8 weeks or we will have to pay a premium price to attract an installer to do the work immediately. The additional cost is \$10,000.
- Gavin must show his dissatisfaction with the situation and ask for Billy to present his options to resolve the situation. These options will be defer the start date by 8 weeks or pay the additional cost of \$10,000.
- Gavin must say that the project puts CBSA at risk in not providing effective project management support for small business. It is unprofessional to charge the client additional money of \$10,000 and the additional cost is not in the contract. It also looks unprofessional to defer the start date and this would cost the client a lot of money in lost revenue.
- Gavin will come to a compromise. For example, CBSA must absorb the cost of \$10,000 and for future contracts there must be a contingency fund provided for additional expenses. Gavin to suggest to try to source interstate contractors before paying \$10,000 additional cost.

#### Billy Walsh [Student]

- Billy is the Project Manager.
- 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.
- Show conflict by disagreeing.
- 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\_7\_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\_7\_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\_7\_CBSA Templates Benchmark

5. Compose an email to the CEO

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

BSBPMG540\_ASSESSOR\_AssNo\_7\_CBSA Templates Benchmark

6. Update Budget Report with the committed expense to date resulting from the information provided.

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

BSBPMG540\_ASSESSOR\_AssNo\_7\_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		
2.	Project Status Report	<input type="checkbox"/>
3.	Change request	<input type="checkbox"/>
4.	Project Issues Register	<input type="checkbox"/>
5.	Email to CEO	<input type="checkbox"/>
6.	Updated Budget Report	

### 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]
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"> <li>speaking clearly and concisely when sharing and seeking information</li> <li>asking questions to identify the required information</li> <li>using active listening techniques to elicit information and confirm understanding</li> <li>collaborating and cooperating with others to achieve shared goals</li> <li>facilitating effective group interactions to negotiate outcomes.</li> </ul>	<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"> <li>monitored by listening and responding to stakeholders about project activities</li> <li>addressed concerns and conflict about budget and quality of catering</li> </ul>	<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"> <li>listened to each stakeholder about their issues and concerns</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>

	<ul style="list-style-type: none"> <li>sought a resolution that was agreed to by both parties</li> </ul>		
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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 <b>Project Status Report</b> , 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 <b>Change Request</b> , 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 <b>project issues register</b> , 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 <b>email</b> , and all fields were completed according to the benchmark. Assessor to refer to assessor benchmark.	<input type="checkbox"/>	<input type="checkbox"/>
6.	The student submitted an updated budget report to monitor expenditure 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 7!



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