



BSBPRC401

Plan procurement

Assessment 2 of 3

Project



Assessment Instructions

Task overview

This assessment task is divided into four [4] parts. Read each question carefully before typing your response in the space provided.

Additional resources and supporting documents

To complete this assessment, you will need:

- Learning material
- CBSA Procurement Policy Document
- Procurement Management Plan Template
- Request For Quote Template
- Procurement Evaluation Template
- Email Template
- Recommendations Template
- Procurement Budget Template
- Procurement Fulfilment Plan 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:

- the processes for conducting the assessment [e.g. allowing additional time]
- the evidence gathering techniques [e.g. oral rather than written questioning, use of a scribe, modifications to equipment]

However, the evidence collected must allow the student to demonstrate all requirements of the unit.

Refer to the Student Handbook or contact your Trainer for further information.



Please consider the environment before printing this assessment.

Case Study

For the purpose of this assessment, you will play the role of Dave O'Connor, Sustainability Expert at CBSA.

CBSA is a consultancy service providing assistance with compliance, finances, human resources, information technology, and other business needs to ensure that businesses have the expertise and support they need to survive and prosper.

Henry Thomas, the Governance Manager, is your direct supervisor, and he has given you the lead role in creating a procurement plan for a set of new office printers and ongoing servicing.

You received the following email from Henry:

Good morning Dave,

Thank you for your time yesterday and for drawing my attention to the ongoing daily issues staff are having with the printers, most commonly with the printers overheating or becoming jammed with paper. As per our conversation, I have looked into the issue further and found that these printers are approaching 10 years old and even though they receive regular maintenance each quarter, they are struggling to keep up with increasing usage as the office grows.

I have received approval from Wi and Gavin to replace the printers and have instructions to begin the procurement process. I would like for you to begin this process immediately and complete the procurement plan starting with the following information.

Wi has allocated a budget of \$12,000 for the replacement of all six printers. We will want to look at keeping each machine under \$2,000 for a total budget of \$12,000.

In total, we will need:

- three desktop laser printers – one each for Wi, Gavin and myself
- three multifunction colour printers for general office use.

Based on a report I received from IT, it looks like the desktop laser printers that Wi, Gavin and I have been using have gone through two sets of toner replacement each. We've done on average, 1,200 pages per year on each of those three machines. We have that single old multifunction printer that we've been using, and it goes through a set of toner replacements twice a year. That's because, as an office, we are printing somewhere close to 10,000 pages per year.

In addition to the printers, we will need a service plan, and a budget for toner replacement costs so that we can factor this into the operations budget going forward.

After you have done some research and identified possible suppliers, you will need to send Wi the procurement plan for approval to proceed with obtaining quotes. Please cc me and Gavin on this.

Kind Regards,

Henry

Governance Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

www.cbsa.com.au

Part A

In this task, you must develop a Procurement Plan for your governance manager Henry Thomas, Gavin Stead, the Managing Director and Wi Zhang the Chief Financial Officer.

1. Complete the Procurement Management Plan

- Read the email from Henry and use the information to assist you in completing the Procurement Management Plan.
 - You are required to complete all parts of this form.
 - You must establish five (5) procurement activities that need to be undertaken, specify the person responsible for each of the procurement activities and set a timeframe.
 - You must research and identify three real-world suppliers that you will seek quotes from for the procurement of the required goods and services
 - When assigning a risk rating, use a scale from 1–10 where 1 = low risk and 10 = high risk.
 - Note: The final section, 'approval or non-approval', will be completed during the role play with Wi Zhang in Part C.

2. Verify procurement plan with stakeholders – Email Wi

- use the CBSA email template to provide a completed Procurement Management Plan to management.
- Provide a brief outline of your findings to date, highlighting any possible issues that you may have found i.e. supply and timeframes.
- Request approval to seek quotes from listed suppliers.
- Approx. word count of the email: 80 - 100 words

You will need to **access** the following documents:

- Procurement Policy and Procedure
- Procurement Management Plan
- Email Template

You will need to **submit** the following documents:

- Completed Procurement Management Plan.
- Email Wi Zhang.

Assessor instructions: The purpose of this task is to assess the student's ability to:

- follow directions from the workplace supervisor on procurement
- plan procurement using workplace policy and procedure and the provided templates
- consult relevant stakeholders throughout the procurement process

Ensure the following documents have been submitted for assessment;

- Procurement Management Plan
- Student email to Wi Zhang.

See the assessor templates for each template for a benchmark example of how each is to be filled out by the student.

ASSESSOR CHECKLIST Did the student demonstrate the required level of competence for each of the following points?	Benchmarks
Completed Procurement Management Plan document.	<ul style="list-style-type: none"> ▪ Student has completed all sections of the template based on the information provided and on research they have conducted for the procurement. ▪ Student has given thought to the evaluation criteria and weighting of the criteria based on research findings and the procurement policy and procedure. ▪ As per procurement policy and procedure student has identified one local company to receive a quote from. ▪ Student has responded appropriately to define risk in this context and what the consequences are to the company. ▪ Refer to the assessor benchmark document for further guidance and an example of how the document needs to be completed. <p>Note: the approval on page 2 will not be completed until after Part C.</p>
Email to management.	<ul style="list-style-type: none"> ▪ Must be addressed to Wi Zhang and CC to Henry Thomas and Gavin Stead. ▪ Able to use professional language. ▪ Must have procurement management plan attached. ▪ Able to communicate purpose of email. ▪ Must request approval to proceed with obtaining quotes ▪ Approx. word count: 80 – 100 words. <p>Refer to assessor benchmark document for an example of a correctly formatted email response.</p>

Part B

Case study

Dave O'Connor has been put in charge of the procurement of printers for the company he works for, CBSA. Dave's role in the company is sustainability expert, and as such, he may not have all the technical knowledge about the printers that he is looking to procure for the company.

Dave has called a meeting with Tina Yates, IT Technician at CBSA, to consult with her about some technical aspects of the products that he is looking to procure. Dave will bring the procurement management plan and procurement evaluation criteria documents to the meeting for input from Tina.

During the course of the meeting, Tina will ask Dave a series of questions to see if he has considered certain technical aspects of the printers that he is considering recommending for procurement. These questions will help Dave frame the procurement plan with a more technical lens and ensure that the machines he recommends will meet the needs of the company in terms of performance and serviceability, and cost.

The meeting takes place in the corporate offices of CBSA between two colleagues.

For this part of the task, you will participate in a role play where you will confer with Tina Yates, IT Technician at CBSA. This is a formal meeting where you will discuss aspects of your procurement plan.

- Read the scenario about the meeting between Dave O'Connor and Tina Yates.
- You will play the role of Dave.
- You are meeting with Tina to gather her input and advice on the printers that you have shortlisted for procurement.

- Prepare for this meeting in advance by having your completed procurement management plan, procurement evaluation template and any research you have done about the procurement of printers for CBSA.
- You will begin the meeting by briefing Tina about the procurement and presenting your research findings.
- Tina may ask you questions, and you must answer to the best of your knowledge. If you do not know the answer to the question she asks, that is a cue for you to do more research before you present your recommendations to others in the company.

Update your procurement management plan and procurement evaluation with any relevant information prior to your meeting with Wi in Part C.

You will need to access the following documents completed in Part A:

- Procurement Management Plan

1. Meeting with Tina

During the meeting, your assessor will be looking to see that you can:

- be well prepared for the meeting
- have your completed documents ready to share during the meeting
- clearly explain your findings and offer your own opinions on the procurement
- discuss Tina's feedback on the suitability and function of the identified printers and suppliers and
- negotiate solutions for any identified issues
- you conduct yourself in a professional manner using appropriate verbal and non-verbal communication
- make note of any required action
- get Tina's approval from a technical perspective on the printers and the suppliers you have found.

2. Request for Quote

After the meeting, you will need to complete one Request for Quote template for each of the three suppliers researched in Part A.

- Complete the first two pages of this template as Dave O'Connor.
- Complete page three of this template as the supplier. Use the information from your market research to complete this.

You will need to **access** the following documents:

- Request For Quote Template

You will need to **submit** the following documents:

- Completed Request For Quote Template x3

Assessor instructions: The purpose of this task is to assess the student's ability to:

- consult with internal stakeholders about various parts of the procurement management plan
- assess the suitability and function of the goods and services to be procured
- communicate effectively in consultation using active listening and questioning, asking open-ended questions and clarifying questions as needed.

Ensure the student brings the following completed documents to the meeting:

- Procurement Management Plan

During the role play, the student must demonstrate that they:

- have conducted research on suppliers and printers that will be considered in the procurement
- can solicit technical input and record the outcomes of the conversation
- can gather information that will be useful in the procurement decision
- can engage in a professional conversation

After the meeting, students will need to complete and submit three (3) Requests for Quote for the suppliers they have selected.

ASSESSOR CHECKLIST DID THE STUDENT DEMONSTRATE THE REQUIRED LEVEL OF COMPETENCE FOR EACH OF THE FOLLOWING POINTS?	BENCHMARKS
Completed Request for Quote Template.	<ul style="list-style-type: none"> ▪ Completed a minimum of three Request for Quote templates. Student may have: ▪ Completed three Request for Quote formats for each printer supplier they have shortlisted. AND <ul style="list-style-type: none"> ▪ Completed three Request for Quote formats for each printer service and toner provider. OR <ul style="list-style-type: none"> ▪ Included a request for quotes on both the supply of printers and for the servicing and toner on the same Request for Quote form (this is fine as many companies provide both services). ▪ Criteria match with the criteria outlined in the Procurement Management Plan. ▪ Research findings used to generate appropriate and varied responses in the 'response form' section. Refer to the assessor benchmark document for further guidance and an example of how the document needs to be completed.

Role play instructions

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

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

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

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, providing them with the context of the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

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

Option 2: Fellow student participants

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Students will need to state their name and that they are a student (as their job title) at the start of the recording to inform consent.

Participants' briefing instructions:

Tina Yates

Tina is a skilled IT technician. She has been with CBSA for several years and is considered the 'go-to' person for IT troubleshooting matters. She is the ideal person to talk to about the specifics of the procurement of printers.

Listen to Dave's (student) presentation of the procurement management plan and evaluation criteria. He should come with his plan and research that he has done about printers that he will recommend for the procurement. Keep in mind he will be looking at desktop laser printers for three senior staff and three large multifunction printers for general office use.

Based on what you hear the student say, ask some of these questions as a follow-up to their presentation. The aim of the questions is to get the student to demonstrate that they have done enough research to fully understand the machines they are recommending:

- How many pages per minute can the printers in question handle?
- How many pages can the toner cartridges print before needing to be replaced (in colour and in black and white)?
- What is the cost of black toner?
- What is the cost of colour toner?
- Can the printers be networked wirelessly to all devices in the office? If not, how many devices can connect?
- What reviews or feedback have the chosen printers received? Is the feedback from similar sized companies as CBSA?
- What warranty does each supplier offer for the machines in question?
- What is the service record and expected service time for each supplier being considered?
- Have you reviewed the manual and seen if it is simple to fix paper jams, replace toner and do basic troubleshooting in house?

- Give your approval from a technical perspective on the printers and the suppliers the student has chosen.

Recording instructions

Your role play must be recorded with all participants captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

ASSESSOR OBSERVATION CHECKLIST

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

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

The meeting should be a maximum of 15 minutes.

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

ACTIVITY	SATISFACTORY YES / NO		ASSESSOR COMMENTS
Task checklist			
Did the student:			
<ul style="list-style-type: none"> • Was the student well prepared for the meeting? 			<ul style="list-style-type: none"> ▪ <i>Students presented themselves professionally and used professional verbal and non-verbal language to communicate with you.</i> ▪ <i>Lead the conversation and presentation of information.</i> ▪ <i>Ensured required documents were:</i> ▪ <i>available and complete</i> ▪ <i>used to share research conducted.</i>
<ul style="list-style-type: none"> • Effectively communicated with Tina to confirm requirements, 			<ul style="list-style-type: none"> ▪ <i>Student presented the pre-prepared documents for discussion.</i> ▪ <i>Explained the procurement plan and research they had conducted.</i>

organisation outcomes and clarify information.			<ul style="list-style-type: none"> ▪ <i>Referred to documentation and used them as discussion points.</i> ▪ <i>Asks for feedback on the goods and suppliers recommended in the plan.</i> ▪ <i>Asks for feedback on the technical aspects of the procurement plan.</i> ▪ <i>Asks for feedback on the evaluation criteria and criteria weightings.</i> ▪ <i>Actively listens to Tina's feedback – ask's clarifying questions to confirm requirements.</i>
<ul style="list-style-type: none"> • Assess the suitability and function of the goods and services to be procured. 			<p><i>Discussed suitability of identified printers and servicing:</i></p> <ul style="list-style-type: none"> ▪ <i>responds to Tina's questions</i> ▪ <i>discusses concerns and possible solutions</i> ▪ <i>takes note of other suggested options to explore.</i>
<ul style="list-style-type: none"> • Approval being sought/gained in the meeting 			<i>Requested and gained approval from Tina during the meeting.</i>
Skills checklist			
<ul style="list-style-type: none"> • Application of active questioning skills 			<i>Asked questions in regard to the technical aspects of the procurement plan and the evaluation criteria of the suppliers.</i>
<ul style="list-style-type: none"> • Application of effective listening skills. 			<i>Showed signs of active listening, such as nodding, paraphrasing and asking questions.</i>

Part C

Case Study

Dave O'Connor (student) has been put in charge of the procurement of printers for the company he works for, CBSA. Dave's role in the company is sustainability expert. At this point in the procurement process, he should have created a procurement management plan and procurement evaluation criteria. He will have already conferred with Tina Yates on the technical aspects of the procurement. The procurement management plan and evaluation criteria documents will now be completed based on his research and the input he has received from Tina.

Before continuing with the procurement process, David needs to discuss the project cycle costs with Wi Zhang, Chief Finance Officer. This is part of the company protocol for procurement of this size. The purpose of the meeting is to review the budget, especially related to ongoing costs for maintenance and service and consumables for the printers in question (i.e. Toner). Wi has already allocated a budget of \$12,000 for the procurement of six printers (three desktop laser printers and three multifunction printers for general office use).

Dave will have the costing breakdown of the printers and he will also need to explain the service and consumables costs over the life of the machines. To do this, Dave will report to Wi about the conversations that he has had with suppliers.

Dave will present a financial analysis of the cost of service and toner for the printers he has shortlisted in the procurement. At the end of the meeting, if Wi is satisfied with the result of David's findings, she will sign off and approve the procurement by signing the procurement management plan.

During the course of the meeting, Dave will seek approval from Wi to proceed with the procurement. To gain approval from Wi to proceed, Dave needs to present his procurement management plan, evaluation criteria and request for quote templates.

Wi will respond to Dave's presentation of the procurement management plan and procurement evaluation criteria by giving input on the budget and how the company would like to structure ongoing service costs associated with the procurement.

For this part of the task, you will participate in a role play where you will consult with Wi Zhang, Chief Finance Officer of the CBSA, about the procurement you are planning. This is a formal meeting where you will discuss aspects of your procurement plan.

1. Be prepared for the **meeting** by coming with the following:
 - Updated procurement management plan
 - Request for Quotes
 - Completed Procurement Budget templates
 - Completed Procurement Evaluation Template
 - Completed Recommendations Template

2. You will prepare a **budget** based on your research:
 - Use the Procurement Budget template provided
 - Create a budget for each quote received.

3. You will complete the **Procurement Evaluation Template**
 - a. Use the information collected.
 - b. Use the evaluation criteria weightings that you created on the Procurement Management Plan.
 - c. Ensure you include a 'Quote response data collation' table for each quote.

4. You will fill out the **Recommendations Template**.

You will need to **access** the following documents:

- Procurement Management Plan
- Request for Quote Templates
- Procurement Budget template.
- Procurement Evaluation Template
- Recommendations Template

You will need to **submit** the following documents:

- Completed Procurement Management Plan with approval from Wi Zhang.
- Completed Procurement Budget templates
- Completed Procurement Evaluation Template
- Completed Recommendations Template

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

- be well prepared for the meeting
- have your completed documents ready to share during meeting
- clearly explain your findings and offer your own opinions on the procurement
- share Tina’s feedback on the suitability and function of the identified printers
- you conduct yourself in a professional manner using appropriate verbal and non-verbal communication.

Assessor instructions: The purpose of this task is to assess the student's ability to:

- communicate financial information relevant to procurement plan
- consult with internal stakeholders about various parts of the procurement management plan
- make procurement recommendations based on the evaluation of offers.
- seek approval for the procurement management plan

During the role play, the student must demonstrate that they:

- have conducted research on suppliers and printers that will be considered in the procurement
- have prepared a budget using the supplied template
- have considered the cost of consumables (toner) and service for the machines they are recommending
- can engage in a professional conversation using active listening and questioning as well as verbal and non-verbal communication.

ASSESSOR CHECKLIST DID THE STUDENT DEMONSTRATE THE REQUIRED LEVEL OF COMPETENCE FOR EACH OF THE FOLLOWING POINTS?	<ul style="list-style-type: none"> ▪ BENCHMARKS
Budget	<ul style="list-style-type: none"> ▪ Student completed the Budget template ▪ The student created a budget breakdown for each quote received (minimum of three). ▪ Student input costs over five years based on the estimated cost of toner replacement and their knowledge of how many pages are printed per year at CBSA ▪ Student input estimated cost of servicing six machines over five years.
Completed Procurement Evaluation Template.	<ul style="list-style-type: none"> ▪ Student has completed the Procurement Evaluation Template and input values into all of the fields. ▪ Criteria and weighting match what they have defined in the Procurement Management Plan document. ▪ Student has correctly calculated totals for each of the suppliers they have requested quotes from. ▪ Student has correctly calculated totals for each of the service providers they have requested quotes from (if they are separate to the printer quotes). ▪ Calculated accurately using the formula: weighting [%] x rating = total. For example: 30% x 4 = 1.2 <p>Refer to assessor benchmark document for further guidance and an example of how the document needs to be completed.</p>
Recommendations Template	<ul style="list-style-type: none"> ▪ Student has completed the Recommendations Template ▪ Their responses align with their research and the responses provided in the evaluation template

Role play instructions

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

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

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

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

Option 1: Peer participants

Should you complete this task with your peers, you must fully brief all participants, providing them with the context of the role play/meeting, a role outline to play and a copy of the observation checklist so that they can prepare for the recording.

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

Option 2: Fellow student participants

Fellow students participating in the recording must be provided with context to their role and responsibilities in the session and have reviewed the assessment activity and observation checklist so that they can prepare for the recording.

Students will need to state their name and that they are a student [as their job title] at the start of the recording to inform consent.

Participants' briefing instructions:

Wi Zhang

Wi is the Chief Finance Officer of the company and as such she has the final decision to proceed with the procurement. It is important for her to understand the procurement considerations and the budget that Dave [the student] is proposing because she can sign off on the procurement management plan. She will be thorough in reviewing all of the evaluation criteria, management plan, and budget that Dave presents. Wi will be polite and professional, but she may ask direct questions and expect a high level of clarity and thorough responses from Dave.

- Listen to the student's presentation on the procurement management plan, procurement evaluation criteria and the recommendations.
- Review the request for quote template.
- Review the student's proposed budget.
 - Ensure the budget proposed is within the \$12,000 budget that has been allocated.

Ask questions that relate to the serviceability of the machines in question.

Ask questions that relate to the ongoing costs associated with the consumables.

- Student should be able to speak to the lifetime cost.
- Student should be aware of how much ink/toner the machines will use.
- Student should be able to speak to the service costs.

Ask questions related to the methods used to select shortlisted suppliers:

- Research methods used
- Criteria used to evaluate (based on the procurement evaluation plan).

Ensure the student brings the following completed documents to the meetings:

- Procurement Management Plan
- Procurement Evaluation Template
- Request for Proposal Templates
- Procurement budget templates for each quote (minimum of three).
- Recommendations template

During the course of the meeting Wi will:

- Encourage Dave to consider the lifecycle costs associated with service and operating costs for the machines in question. If Dave does not present enough information here, Wi will ask him to gather more information.
- Ask Dave to give more weight or preference to companies that can provide both goods and service options and strong warranties.
- Ask Dave to ensure that the machines come with long warranties and service technicians are available in short time frames to attend to matters at the office.
- Ask Dave any clarifying questions about the budget, including how he has calculated figures, where he has gathered the information he is presenting.
- Ask Dave his opinion of the risk associated with selecting one machine/provider over another. He should be able to identify that there is inherent risk of the machines breaking and that he has considered contingencies like warranty and/or cost of service.

Once the conversation has concluded and you (Wi) feel satisfied that Dave (the student) has conducted thorough research and created an appropriate budget and management plan, you can verify the procurement methods and give Dave approval to proceed with the procurement based on his presentation. This is done verbally and by signing the procurement management plan.

Ensure that the procurement management plan is signed by Wi as this is required for the student to receive a result in this assessment task.

Recording instructions

Your role play must be recorded with all participants captured in a virtual room using a system such as Zoom, Skype or Teams.

Consent to participate in the recording must be captured for all participants at the start of the meeting. This is achieved by the student reading the following statement at the start of the recording, with all participants replying with their name and job title to inform consent.

"This session/presentation is being recorded for assessment purposes for my course with Swinburne Open Education. This session will be recorded and submitted through my course online learning platform to my

Assessor for grading. All participant/s in this session indicate their consent to be included in this recording by stating their name and job title."

The time taken to capture consent at the start of the recording does not count towards the recording time limit.

Include this recording as part of your assessment submission.

ASSESSOR OBSERVATION CHECKLIST

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

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

The meeting should be a maximum of 15 minutes.

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

ACTIVITY	SATISFACTORY YES / NO	ASSESSOR COMMENTS		
Task checklist				
Did the student:				
<ul style="list-style-type: none"> Was the student well prepared for the meeting? 				<ul style="list-style-type: none"> <i>Student presented themselves professionally and used professional verbal and non-verbal language to communicate with you.</i> <i>Lead the conversation and presentation of information.</i> <i>Ensured required documents were:</i> <ul style="list-style-type: none"> <i>available and complete</i> <i>used to share research conducted.</i> <i>Student has created a budget that covers aspects of the procurement related to:</i> <ul style="list-style-type: none"> <i>Cost of goods (printers)</i> <i>Cost of consumables (toner)</i> <i>Cost of servicing.</i>
<ul style="list-style-type: none"> Effectively communicated research findings, financials and recommended goods and services. 				<ul style="list-style-type: none"> <i>Student presented the pre-prepared documents for discussion.</i> <i>Explained the procurement plan and research they had conducted.</i> <i>Referred to documentation and used them as discussion points.</i> <i>Asks for feedback on the evaluation criteria and criteria weightings.</i> <i>Explains Tina's feedback and identifies any resulting changes to the plan.</i> <i>Actively listens to Wi's feedback – ask's clarifying questions.</i> <i>Students may request a budget increase based on market research.</i>

<ul style="list-style-type: none"> Did the student ask Wi Zhang to sign off on the procurement management plan? 				<ul style="list-style-type: none"> <i>The student was able to conclude the meeting by asking Wi to sign off on the procurement management request.</i>
Skills checklist				
<ul style="list-style-type: none"> Application of active questioning skills 				<i>Asked questions in regard to the evaluation criteria of the suppliers and criteria weightings.</i>
<ul style="list-style-type: none"> Application of effective listening skills. 				<i>Showed signs of active listening, such as nodding, paraphrasing and asking questions.</i>

Part D

For this part of the task, you will finalise the procurement process by creating a **Procurement Fulfilment Plan**.

Set up the procurement fulfilment plan using the template provided:

- add extra rows to the table as needed
- complete all sections.

Fill out the procurement details based on the information you have gathered so far.

- List the Resource Requirements you identified in your Procurement Management Plan and explain how they will be evaluated and who is the person responsible for evaluating each requirement and specify the date of the evaluation.
- Consider how you might evaluate supplier performance and develop at least four (4) key performance indicators (KPIs).

KPIs must be:

- Measurable
- Specific
- Attainable
- Provide value or insight into procurement fulfilment.

Consider the impact of each KPI on the procurement objectives and identify an acceptable score from 1–10 accordingly.

You will need to **access** the following document:

- Procurement Fulfilment Plan template

You will need to **submit** the following document:

- Completed Procurement Fulfilment Plan

Assessor instructions: The purpose of this task is to assess the student's ability to:

- evaluate resource requirements for all procurement activities
- determine performance targets and metrics to measure suppliers against those targets
- identify which aspects of supplier performance are most critical (scoring performance).

Ensure the following document has been submitted for assessment:

- *Procurement Fulfillment Plan.*

ASSESSOR CHECKLIST: PART D Did the student demonstrate the required level of competence for each of the following points?	Benchmarks
1. The student has completed the Procurement Fulfillment Plan with all of the required information.	<p>The document is complete with all information. Scoring, variance and trend will be blank as this data is not available. Refer to assessor template for benchmark responses and further guidance on completing this template.</p>
2. KPIs listed are realistic and the corresponding data is relevant to the KPI.	<p>The student has identified KPIs related to the procurement that are relevant and measurable. Measurable KPIs may include:</p> <ul style="list-style-type: none"> ▪ delivery times/scheduled ▪ quality of product ▪ time to attend to service equipment ▪ environmentally friendly ▪ quality of consumables (toner) ▪ customer service received. <p>The corresponding information for 'area', 'performance target', 'metric', 'likelihood' and 'purpose' are all consistent with the KPI.</p> <ul style="list-style-type: none"> ▪ 'Area' refers to either good/s or service/s. ▪ 'Performance target' refers to the expected performance from the supplier. <p>For example, if the company requires service requests to be attended within 24hrs the target reflects this expectation/agreement.</p> <ul style="list-style-type: none"> ▪ 'Metric' refers to the indicator or quantifier for measurement. <p>For example, toner replacement cost is less than \$200 per unit.</p> <ul style="list-style-type: none"> ▪ 'Likelihood' refers to the frequency that one would expect there to be a need to address the criteria or area. <p>For example, we expect the machine to need a minor service at least two times a year and a major service once a year.</p> <ul style="list-style-type: none"> ▪ 'Purpose' relates to the reason why the KPI is included. <p>For example, we look at the time it takes to repair or replace faulty parts because this impacts business operations. If the lead time to repair is too long the company may look for another supplier or there may be penalties built into the contract.</p> <p>See benchmark document for further guidance and example of a complete format.</p>
3. Resource Requirements Evaluation	<p><i>Students inserted the five [5] resource requirements they identified in the Procurement Management Plan, provided how they will be evaluated, by whom and when in the table provided. The person responsible they chose needs to be relevant to the resource requirement to be evaluated.</i></p>

Assessment checklist:

Students must have completed all eight (8) questions within this assessment before submitting. This includes:

1	Part A: - Completed Procurement Management Plan - Student email to Wi Zhang.	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
2	Part B: - Role Play with Tina - Completed Request For Quote Template x3	<input type="checkbox"/>
3	Part C: - Role Play with Wi - Completed Procurement Management Plan with approval from Wi Zhang. - Completed Procurement Budget templates - Completed Procurement Evaluation Template - Completed Recommendations template	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
4	Part D: - Completed Procurement Fulfilment Plan	<input type="checkbox"/>



Congratulations, you have reached the end of Assessment 2!

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