



BSBPMG530

ASSESSOR GUIDE

## Manage project scope

Assessment 5 of 7

Project

## Assessment Details

Undertake project authorisation activities for Café style refit of the staff kitchen

To complete this assessment, you will need the following:

- Access to your learning materials
- Access to a computer and the internet
- Access to Microsoft Word (or a similar program)
- Workplace documentation to document and manage project scope:
  - Draft Email Template
  - Email from Gavin Stead
  - Project Authorisation 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.

## Assessment Instructions

### Task Overview

To complete this part of the assessment, you will act as Complete Business Solutions Australia (CBSA) Project Manager, Tina Hughes. Following on from the high level of staff engagement and positivity that surrounds the building of the indoor sustainable garden wall, staff and management have agreed to create a lively café style refit of the staff kitchen.

It was agreed that the kitchen renovation would have the following features and benefits:

- **Make the space lively**

Paint the walls in fresh, vibrant colours. Frame motivational posters and add brightly coloured accessories to shelves. The more welcoming and relaxing the space, the more revived people will feel when they return to work.
- **Make the walls interactive**

Add glass, chalkboard and whiteboards with pens and chalk, for brainstorming and announcements, with positive, motivational quotes.
- **Bring the outside in**

Maximise natural light and use potted plants to bring nature into the workspace. To boost a sense of health and well-being, add attractive colours and scents.
- **Provide comfy chairs and tables**

Set aside an area for people to sit and enjoy coffee or lunch. Comfortable tables and chairs will create an opportunity for employees to engage with each other, discuss their projects, solve problems, and build lasting cross-team relationships.
- **Install a coffee machine**

There is nothing that brings Australians together like a good cup of coffee. Add an automatic coffee machine to your kitchen, with essential extras like sugar and milk. If you've got the budget, invest in a café-style coffee machine. A perfectly poured flat white is sure to impress clients.
- **Provide the right tools**

Make it more useable, fill the cupboards with a range of useful equipment and appliances. Cups, chopping boards, cutlery, plates and bowls, hand towels and sanitiser.
- **Keep it clean**

Is there anything worse than a dirty kitchen? Stock a range of ready-to-use cleaning supplies that employees can use to keep the kitchen and their workspaces clean and germ-free.
- **Be eco-friendly**


Provide recycling and waste food bins as well as eco-conscious supplies, like biodegradable cups, cutlery, recycled-content napkins and sustainably sourced coffee, tea and hot chocolate.

Your job is to complete three project authorisation activities according to CBSA policies, procedures, and business requirements prior to starting work.

## Additional resources and supporting documents

To complete this assessment, you will need the following:

- Access to your learning materials
- Access to a computer and the internet
- Access to Microsoft Word (or a similar program)
- Workplace documentation to document and manage project scope:
  - Draft Email Template
  - Email from Gavin Stead
  - Project Authorisation Template

 <p><b>CBSA</b> COMPLETE BUSINESS SOLUTIONS AUSTRALIA</p>	<p>The following assessment tasks use a simulated business called Complete Business Solutions Australia (CBSA). To complete the assessment tasks, students must access information, templates, policies, and procedures associated with CBSA.</p> <p>Use the following username and password to log into <a href="https://www.cbsa.com.au">https://www.cbsa.com.au</a>:</p> <p>Username: SOE (case sensitive) Password: SOE (case sensitive)</p>
--	--

**Task Instructions:** Undertake project authorisation activities.

Complete the following three (3) tasks.

### Task 1

Develop a procedure to put a project team together. Your procedure must include the following:

- a defined goal (maximum 25 words)
- a preliminary outline of at least three steps to achieve the goal (maximum 25 words)
- at least three assigned responsibilities (job roles) to complete the steps (maximum 25 words)
- a list of at least three resources required to achieve the goal (maximum 25 words)
- space for the Managing Director to approve the procedure.

The format and the language must be simple, quick to read, and easy to understand for all potential stakeholders.

Submit your procedure as evidence for assessment.

### Assessor Instructions

The student must develop a procedure to put a project team together. The procedure must include the following:

- a defined goal (maximum 25 words)
- a preliminary outline of at least three steps to achieve the goal (maximum 25 words)
- at least three assigned responsibilities (job roles) to complete the steps (maximum 25 words)

- a list of at least three resources required to achieve the goal (maximum 25 words)
- space for the Managing Director to approve the procedure.

Steps, responsibilities, and resources may vary depending on student preferences. An example of a suitable procedure appears below.

Goal	Put a project team together to create a lively café style refit of the staff kitchen.
Steps	<ol style="list-style-type: none"> <li>1. Communicate the project goal to all staff members via email.</li> <li>2. Ask staff to reply with their expression of interest and availability information.</li> <li>3. Schedule an initial meeting.</li> <li>4. Attend the meeting and discuss potential project roles.</li> </ol>
Responsibilities	<ol style="list-style-type: none"> <li>1. The managing Director is to email all staff.</li> <li>2. The administration manager to schedule the initial meeting in consultation with team leaders.</li> <li>3. The administration Manager to advise the Project Manager of the meeting date.</li> <li>4. The project Manager to confirm room booking requirements with the Administration Manager.</li> <li>5. Project Manager to send meeting invitations.</li> <li>6. The project Manager and interested staff to attend the meeting.</li> <li>7. Project Manager to provide an overview of the potential project and project goals.</li> <li>8. Project Manager to identify potential roles.</li> <li>9. Staff are to volunteer according to their skills, experience, and personal interests.</li> </ol>
Resources	<ol style="list-style-type: none"> <li>1. Interested staff</li> <li>2. Time to meet</li> <li>3. A meeting place</li> </ol>
Approved	
Date	

## Task 2

Draft an email to Gavin Stead, Managing Director at CBSA. Your email must:

- explain that you want to put a project team together (maximum 25 words)
- confirm that you have developed a suitable procedure (maximum 25 words)
- seek his signature to approve the procedure (maximum 25 words)
- ask for permission to start work (maximum 25 words)
- describe how you will contribute to the overall project goals (maximum 25 words)
- request confirmation of the requirements to start work (maximum 25 words).

Submit your email as evidence for assessment.

The Draft Email Template is included below.

### Assessor Instructions

The student must draft an email to Gavin Stead, Managing Director at CBSA. In the email the student must:

- explain that they want to put a project team together (maximum 25 words)
- confirm that they have developed a suitable procedure (maximum 25 words)
- seek his signature to approve the procedure (maximum 25 words)
- ask for permission to start work (maximum 25 words)
- describe how they will contribute to the overall project goals (maximum 25 words)
- request confirmation of the requirements to start work (maximum 25 words).

A suitable example appears below.

	<p>To: Gavin Stead (gavin.stead@cbsa.com.au)</p> <p>From: Tina Hughes (tina.hughes@cbsa.com.au)</p> <p>Date/time: Friday 8.00 am.</p> <p>Subject: Project Create a lively café style refit of the staff kitchen</p> <p>Attachments: Procedure to get a project team together</p>
---	--

Hi Gavin,

As you know, last week, the staff and management voted to refit the staff kitchen to create a lively café style.

I want to start the ball rolling by getting a project team together.

Before I do, I'd like you to look at the procedure I developed and let me know if it's alright to start work. You'll notice there's space for your signature, and I'd appreciate it if you could confirm your approval.

Once I know you're okay with me going ahead as planned, I'll work on setting up a time to begin stakeholder consultation.

I'll also coordinate the consultation and planning process, develop a project scope management plan, and monitor implementation.

Are there any other procedures I need to consider before I start work?

Cheers

Tina Hughes

Project Manager

300 Fictional Way, Sydney, NSW 2000

Phone: 1800 111 222

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



### Task 3

Read the reply from Gavin Stead and complete the attached Project Authorisation Template below.

If you can't find relevant information within the email, undertake your research and complete the form according to CBSA policies and procedures.

Your Project Authorisation Template must include the following:

- the name of the project
- your name as the author
- your position at CBSA
- the date of submission and your signature
- the reason for the project
- The proposed budget including:
  - the overall maximum amount
  - individual amounts for each stage of the project
- at least two deliverables
- key stakeholders and their responsibilities
- at least two measurable benefits
- a timeline and expected date of completion for each stage of the project.

Submit your Project Authorisation Template as evidence for assessment.

The email for Gavin Stead and the Project Authorisation Template is included below.



To: Tina Hughes (tina.hughes@cbsa.com.au)  
From: Gavin Stead (gavin.stead@cbsa.com.au)  
Date/time: Wednesday 2:05 pm  
Subject: Café-style refit of the staff kitchen  
Attachment: Project Authorisation Template.docx

Hi Tina,

Further to our conversation, I agree with the other staff and management that having a Café style staff kitchen for the CBSA building has a lot of merits. There's nothing that brings Australians together like a good cup of coffee. Comfortable tables and chairs will create an opportunity for employees to engage with each other, discuss their projects, solve problems, and build lasting cross-team relationships.

We do need to formalise this, though, so can you please prepare a project authorisation document (template attached) following organisational procedures to be presented to the board for authorisation of funding and confirming governance arrangements?

I think Glenda Ferris from HR will act as the project owner because she manages the finances, and I'll be providing the final sign-off for each stage and spending over \$500.00 as the sponsor.

You may need to research costs. I think we need to keep the overall cost under \$15,000 and you may need to consider having some staff trained in looking after the space once it is installed as I don't like the idea of



any of the place getting untidy and uninviting – this would certainly create the wrong impression of our organisation.

From our initial discussions, I think your estimate of about four to six weeks for completion is probably about right.

Once the authorisation form is completed, please forward it to me for review and approval as a project sponsor. As the project is looking to be over \$10,000, policy dictates the board will need to give their approval for spending and resourcing. I will table the document at the next board meeting to seek their approval; however, I don't see any barriers to acceptance.

Just another thing, please use the same builder we used on the sustainable garden wall. Lucas Smith was great, and I really appreciate his ability to help with training too.

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)



### Assessor Instructions

The student must read the reply email from Gavin Stead and complete a Project Authorisation Template below.

An example with suitable responses appears below.

PROJECT AUTHORISATION			
Project name	Café-style refit of the staff kitchen		
Author	Tina Hughes		
Position	Project Manager		
Date of submission	YY/XX/20XX	Signature	Tina Hughes
Reason for project	Staff voted to refit the staff kitchen in a lively Café style		
Proposed budget	<\$15,000 Design \$3,500 Builder costs \$8,300 Coffee machine \$4,000 Chairs and tables \$2,250 Education and training of staff \$600.		

Deliverables	Create a lively café style refit of the staff kitchen of the CBSA head office and educate and train some CBSA staff to maintain the space.
Key stakeholders and responsibilities	<p>Project sponsor (Gavin Stead) – responsible for final sign-off before presentation for board approval and obtaining final approval</p> <p>Project manager (Tina Hughes) – responsible for planning and overseeing the project through its life cycle</p> <p>A project owner (Glenda Ferris) – responsible and accountable for change management and project outcomes and deliverables</p> <p>Local builder and designer (Lucas Smith) – responsible for building the café style refit of the staff kitchen and providing training to some staff on its maintenance</p> <p>The board – is responsible for spending approvals over \$10,000.</p>
Measurable benefits	<p>Reduction in CO2 within the building and improved staff and customer satisfaction</p> <p>Staff retention rate</p> <p>Staff satisfaction survey results</p>
Other resources	<p>Comfortable tables and chairs</p> <p>coffee machine</p> <p>Cups, chopping boards, cutlery, plates and bowls, hand towels and sanitiser</p> <p>Chalkboard and whiteboards</p> <p>Paint</p> <p>Brightly coloured accessories</p> <p>Biodegradable cups, cutlery, recycled-content napkins and sustainably sourced coffee, tea and hot chocolate</p>
Timeline and expected dates of completion	<p>Design: 01/11-15/11</p> <p>Building: 16/11-30/11</p> <p>Planting: 01/12-05/12</p> <p>Painting and Installation: 06/12–7/12</p> <p>Training of staff: 08/12-10/12</p>
Date of approval	
Signature	
Position	

### Assessment checklist

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

		Y	N
1	Develop a procedure to put a project team together. The student must submit their procedure as evidence for assessment.	<input type="checkbox"/>	<input type="checkbox"/>

2	Draft an email to Gavin Stead, Managing Director at CBSA. The student must submit their email as evidence for assessment.	<input type="checkbox"/>	<input type="checkbox"/>
3	Complete a Project Authorisation Template. The student must submit their completed Project Authorisation Template as evidence for assessment.	<input type="checkbox"/>	<input type="checkbox"/>

### Congratulations, you have reached the end of Assessment 5

#### Assessment marking criteria:

The evidence submitted demonstrates that the student has satisfactorily (S) covered the following criteria, or the evidence is unsatisfactory (U) and requires resubmission.

		S	U
1	Develop a procedure to put a project team together.		
	The procedure must prove the student can:	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Adhere to organisational policies and procedures – for example, by using approved language and format defined in CBSA policies and procedures</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Develop a procedure for project authorisation with an appropriate authority – the procedure is confirmed in task two</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Obtain authorisation to expend resources – partially demonstrated by developing a procedure to start work with space for the appropriate authorisation</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Develop project documentation and procedures using formats and language appropriate to the context – partially demonstrated by producing a procedure and formatting to suit all potential stakeholders:               <ul style="list-style-type: none"> <li>○ Plain English</li> <li>○ logical sequence</li> </ul> </li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
2	Sequence complex activities and manage relevant communication – for example, by providing steps to achieve the project goal	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>• Confirm project delegations – partially demonstrated by identifying roles and responsibilities.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	Draft an email to Gavin Stead, Managing Director at CBSA.		
	The email must prove the student can:	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>• Obtain authority to expend resources – partially demonstrated by asking for permission to start work</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• Adhere to organisation policies and procedures – demonstrated by using approved language and communication conventions in the CBSA policies and procedures</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
<ul style="list-style-type: none"> <li>• Use appropriate conventions and protocols when communicating with diverse stakeholders – for example, in relation to email, using simplified language and separate sentences for each dot point, and an appropriate greeting.</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	

3	Complete a Project Authorisation Template.		
	The Project Authorisation Template must prove that the student can:		
	<ul style="list-style-type: none"> <li>Obtain authorisation to expend resources – for example, by completing the Project Authorisation Template (assessor to approve before going onto the next assessment)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Confirm project delegations and governance arrangements – for example, by explaining how the project will work/ describing the hierarchy/ identifying delegated project sponsors, managers, owners and other stakeholders (suitable responses are included below)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Establish measurable project benefits and outcomes – suitable responses are included below</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Interpret an analyse information from [a range] of complex texts – in this assessment; the email is an example of a complex text (the student interprets and analyses other complex texts in other parts of the assessment)</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>Interprets numerical information to determine project timelines – in this assessment, the student interprets the email information timelines and expected date of completion</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
	<ul style="list-style-type: none"> <li>adheres to organisational policies and procedures – as demonstrated by completing the template according to CBSA guidelines</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>
<ul style="list-style-type: none"> <li>Establish a shared understanding of desired project outcomes with relevant stakeholders – for example, by using the information in the email from a stakeholder</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	
	The student must demonstrate sufficient knowledge about the roles and responsibilities of the project manager in relation to project planning – as demonstrated by specifying in the key stakeholder and responsibilities section.	<input type="checkbox"/>	<input type="checkbox"/>

### Copyright Agency License:

#### WARNING

This material has been reproduced and communicated to you by or on behalf of UP Education in accordance with section 113P of the Copyright Act 1968 (the Act).

The material in this communication may be subject to copyright under the Act. Any further reproduction or communication of this material by you may be the subject of copyright protection under the Act.

Do not remove this notice.

### Eduworks (AKA RTO Advice):

© RTO Advice Group Pty. Ltd. as trustee for RTO Trust (ABN 88 135 497 867) t/a Eduworks Resources [2021]  
Reproduced and modified under license by UP Education Online Pty Ltd.

### © UP Education Online Pty Ltd 2024

Except as permitted by the copyright law applicable to you, you may not reproduce or communicate any of the content on this website, including files downloadable from this website, without the permission of the copyright owner.

House of Learning (Provider Number 21583) ABN 21 144 869 634 trading as Colab.