



**BSBPMG420**

# Apply project scope management techniques

Assessment 3 of 3

Project 2

**Assessor Guide**



## Assessment Instructions

### Task overview

This assessment consists of **six (6)** tasks related to a simulated project.

Read the scenarios and related task instructions carefully before completing each task.

### Supporting documents

To complete this assessment, you will need to access the following documents:

- Purpose Statement (available on LMS)



## 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.

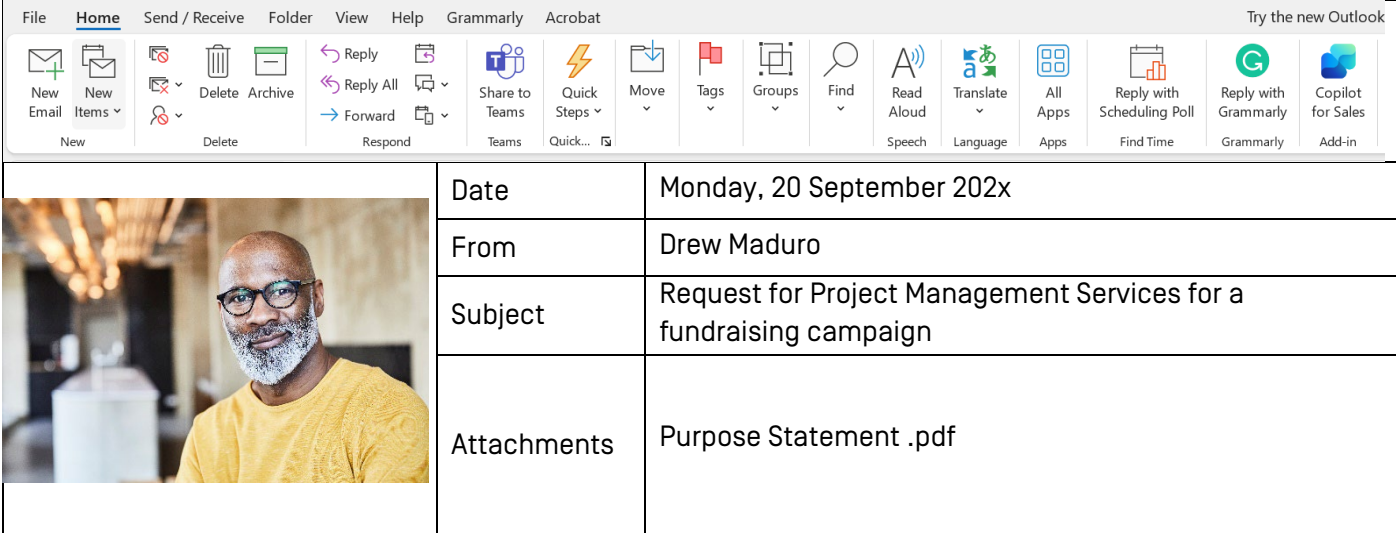



Please consider the environment before printing this assessment.

## SCENARIO

You are employed as a Project Officer at CBSA.

Read the following email from a potential new client of CBSA, then complete the tasks that follow.



	Date	Monday, 20 September 202x
	From	Drew Maduro
	Subject	Request for Project Management Services for a fundraising campaign
	Attachments	Purpose Statement .pdf

Dear CBSA Project Management Team,

I hope this email finds you well. My name is Drew Maduro, and I am the Director of Operations at VitalGift Blood Bank, a non-profit organisation dedicated to ensuring a steady and reliable blood supply for hospitals and patients in need across the region. We are currently planning a major fundraising campaign and are seeking CBSA's expertise in project management to help ensure its success.

VitalGift is embarking on an ambitious initiative to raise funds for the expansion of our blood collection and distribution services. This expansion is crucial to meet the growing demand for blood in underserved areas, improve our storage facilities, and enhance our ability to respond to emergencies. Given the importance of this project, we recognise the need for professional project management support to guide us through the process.

We believe that CBSA's expertise can play a critical role in helping VitalGift achieve our fundraising goals, thereby enabling us to save more lives through enhanced blood donation services. We would welcome the opportunity to discuss this project further and explore how your team can support us in this endeavour.

I have attached a Purpose Statement document containing some information regarding our goals. Please let us know what further information you require to commence the project. We hope to launch the campaign mid-November and allow it to run for a month. Given that we have multiple sites and stakeholders across the country, using project management software will be essential for facilitating communication and coordination among teams. To ensure transparency and effective project management, we have made it a mandatory deliverable to create a Project Scope Management Plan within the chosen project management software.

We look forward to the possibility of working with CBSA and are eager to move forward with this important project.

Thank you for considering our request.

Best regards,

Drew Maduro

Director of Operations

VitalGift Blood Bank  
1 Quay Street, Penrith, NSW 2750  
Phone: 11 22 33  
www.vitalgift.com.au



## TASK 1

Read the scenario and the client's email carefully, including the information captured in the attachment.

Jess Yun, CBSA's Project Manager has asked you to review and evaluate the information provided in the email and its attachment to better understand the requirements.

Complete the table provided with the following information:

- identify **two (2)** objectives for the project
- propose **two (2)** project deliverables for each objective. **[Note: One deliverable is determined by the client.]**
- propose at least **one (1)** measurable outcome for each deliverable
- identify any other requirement relevant to the project.

### Assessor instructions

Student is required to complete the table provided with the required information, such as two (2) objectives, two (2) deliverables for each objective, one (1) measurable outcome for each deliverable, any other requirement relevant to the project. One deliverable must be the creation of a Project Scope Management Plan using the chosen project management software. Project objectives and other requirements are provided in the project initiation documentation (i.e. email and Purpose Statement), while other information (e.g. deliverables and measurable outcomes) must be developed by the student. Answers may vary; however, they must be realistic and relevant to the project.

A sample answer is provided below.

Two (2) objectives (5-20 words each)	Project deliverables (15-25 words each)	Measurable outcomes (10-50 words each)	Other requirements
1. Raise \$200,000 in 4 weeks	1. Develop a comprehensive Fundraising Campaign Plan outlining the strategies, activities, and timeline for the fundraising campaign.	Completion of the Campaign Plan Document finalised and approved by a specific date.	<ul style="list-style-type: none"><li>• Launch the campaign mid-November</li><li>• Duration of campaign: 4 weeks</li><li>• Use a project management software</li></ul>
	2. Create a Project Scope Management Plan using the chosen project management software.  <b>Additional response:</b>	Set up the Project Scope Management Plan using the chosen project management software.  A series of performance reports [at least weekly]	

	Develop a Campaign Performance Report that tracks and analyses the performance of the fundraising campaign throughout its duration.	are generated and delivered to stakeholders throughout the 4-week campaign, tracking the total amount raised, donor engagement metrics, and the effectiveness of different fundraising activities.	
2. Increase awareness and engagement with donors and supporters, aiming for a 10% increase in donor participation.	1. Design a targeted campaign to enhance donor engagement and increase participation by 10%.	Achieve a 10% increase in the number of active donors compared to the baseline number of donors before the campaign.	
	2. Develop a comprehensive report detailing the activities and effectiveness of the awareness and engagement efforts aimed at increasing donor participation.	Demonstrate a measurable increase in donor engagement metrics, such as a 10% increase in donor participation rates compared to the previous period.	

## TASK 2

Using the template provided, write an email to CBSA's Project Manager, Jess Yun, and Drew from VitalGift to suggest a comprehensive and relevant project scope statement based on the information provided and obtain approval it. In your email include your responses for Task 1 to outline project's deliverables and measurable outcomes.

### Assessor Instructions

Student must create a comprehensive and relevant project scope and write an email to project authority to obtain approval. The email must also include the responses for Task 1 to outline project's deliverables and measurable outcomes.

A sample email is provided below.

From	<<Your Name>>
To	Jess Yun, Drew Maduro
Subject	<<type your subject>> For example: Project Scope Approval – VitalGift Fundraising Initiative
Attachments	<<Write the attachment/s name if applicable>> N/A

<<write your 300-500 words email here >>

For example:

Dear Jess and Drew,

I hope this email finds you both well.

As we move forward with the VitalGift Fundraising Initiative 202X, I have developed a project scope statement to guide our efforts and ensure alignment with our objectives. Given the importance of this project, your review and approval are crucial to proceed effectively.

**Project Scope Statement:** This project encompasses the planning, execution, and monitoring of a comprehensive fundraising campaign that includes donor outreach, public relations, event management, and online fundraising efforts. It also involves the allocation of the funds raised to the specified infrastructure and operational improvements.

**Objectives:**

1. Raise \$200,000 in 4 weeks to expand our blood collection, storage, and distribution capabilities, aiming for a 10% increase in donor participation.
2. Increase awareness and engagement with donors and supporters, aiming for a 10% increase in donor participation.

**Deliverables:**

- Develop a comprehensive Fundraising Campaign Plan outlining the strategies, activities, and timeline for the fundraising campaign.
- Create a Project Scope Management Plan using the chosen project management software.
- Design a targeted campaign to enhance donor engagement and increase participation by 10%.
- Develop a comprehensive report detailing the activities and effectiveness of the awareness and engagement efforts aimed at increasing donor participation.

**Measurable outcomes:**

- Completion of the Campaign Plan Document finalised and approved by a specific date.
- Set up the Project Scope Management Plan using the chosen project management software.
- Achieve a 10% increase in the number of active donors compared to the baseline number of donors before the campaign.
- Demonstrate a measurable increase in donor engagement metrics, such as a 10% increase in donor participation rates compared to the previous period.

Please review the proposed scope statement, objectives, deliverables, and measurable outcomes and provide your feedback or approval at your earliest convenience. Your input is vital to ensure that we have a clear and actionable plan to achieve our fundraising goals and enhance donor engagement.

Thank you for your attention to this matter. I look forward to your response.

Kind regards,  
Student/s name

### TASK 3

Jess and Drew both approved your scope statement and the suggested objectives and deliverables with the suggested measurable outcomes. As one of the agreed tasks for this project, it is time to set up the 'Scope Management Plan' with the agreed scope statement, objectives and deliverables using a project management software of your choice, such as Asana. When choosing a project management software, you need to make sure that you'll be able to complete this task.

Set up the Scope Management Plan in your chosen software, using the following steps:

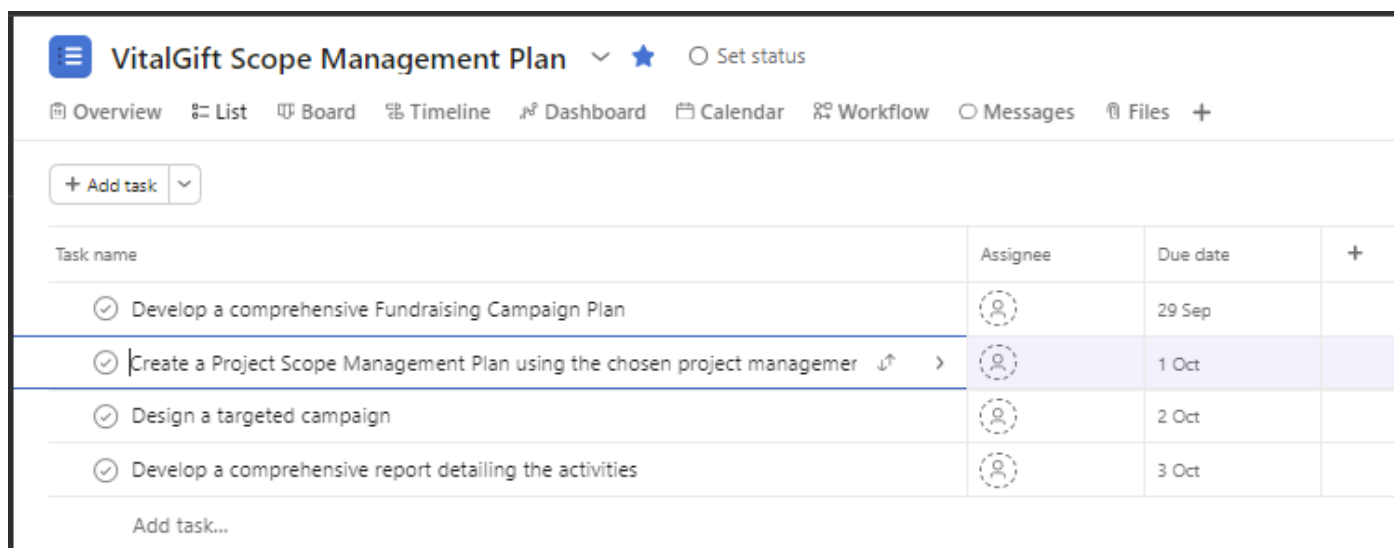
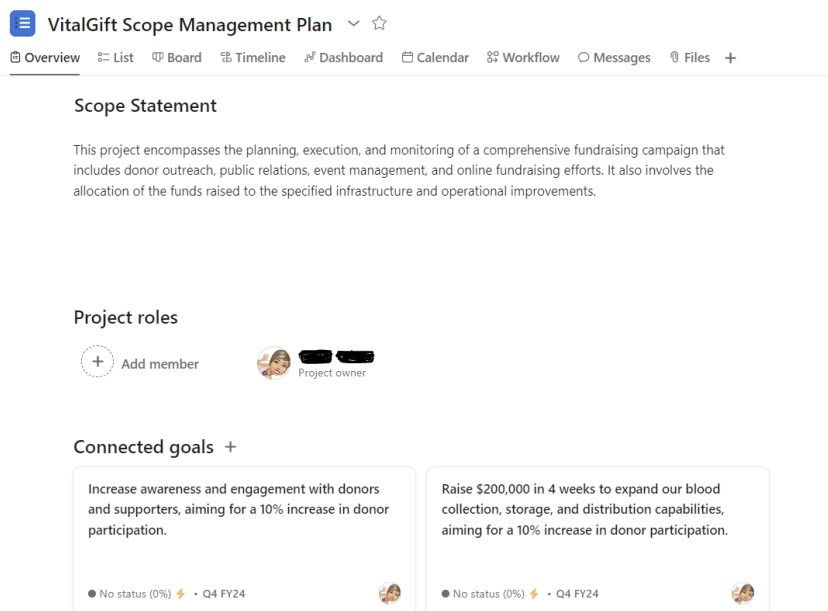
- If you don't have an account yet, go to the software's official homepage, such as [Asana](#) and create a free account. [Click on "Get started", then sign up either with your Google account or by providing your email address and following the prompts.]
- Once you created an account, create the project's page and name it 'VitalGift Scope Management Plan'. **[You will need this page for Task 5 as well.]**
- Using your answers given to Task 1 and the scope statement, create the '**Scope Management Plan**'. [Rename the project's description to 'Scope Statement', then add the agreed objectives. Objectives can be also called as 'goals'].
- Take a screenshot of the project's overview containing the scope statement and objectives and insert it in the box provided. [You can take a screenshot by using the computer's 'Snipping tool' or by clicking on 'Print Screen' and pasting the screenshot in the space provided below.]
- Click on 'List' and add the four [4] deliverables [two for each objective]. Your deliverables will appear as 'tasks' in the project. Work out a realistic timeline as well and add due dates for each deliverable.
- Once all tasks are added, take a screenshot of the list of tasks.
- Insert your screenshots into the box provided below. Your screenshots must clearly show all the details listed above.

**Note:** Depending on the project management software you choose to use, you may be able to take only one screenshot if the information detailed above is captured in one page. If you are using Asana, you will need to insert **two [2] screenshots** [as explained above].

<<Insert your screenshot/s here>>

Assessor instruction: Students must create the project's Scope Management Plan using a project management software of their choice, following the steps provided and provide a screenshot. The plan must include the scope statement, 2 objectives and 4 deliverables (2 deliverable for each objective), as it is also outlined in Task 1 and Task 2. Due dates given must realistic and within the given timeframe [Drew's email was sent on 20 September and the campaign must be launched in 3 months.]

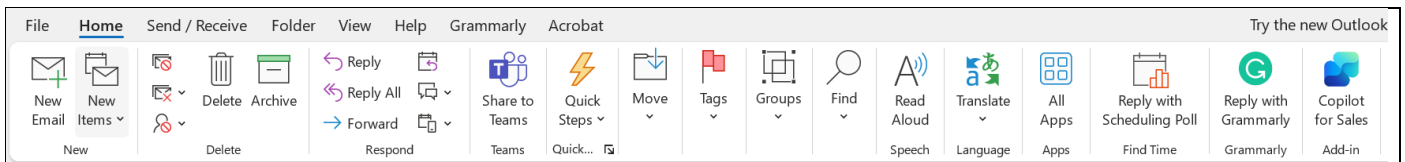
See sample screenshots below of how the Scope Management Plan should look like. Sample answer was created using Asana, therefore there are 2 screenshots: one of the project's overview page, and one with the tasks (or deliverables). If the student is using a different software, all information may appear on one page, so they may add only one screenshot.




## TASK 4

The campaign is just about to commence when the following email was received by CBSA:





	Date	Monday, 1 November 202x
	From	Drew Maduro
	Subject	Urgent: Impact of Bird Flu Outbreak on VitalGift Fundraising Project
	Attachments	

Dear CBSA Team,

I hope this message finds you well. As it was agreed previously, any challenges or variations to the project must be communicated to CBSA as soon as practicable.

According to this, I am writing to inform you of a critical development that will significantly impact our VitalGift Fundraising Campaign. Health authorities have recently issued a warning about a potential bird flu outbreak, which could lead to severe restrictions on in-person gatherings and events. This situation presents an immediate and serious challenge to our project, particularly regarding the in-person fundraising events and blood donation drives that are central to our current strategy.

**Implications for the Project:**

- **Event Cancellations:** We anticipate that planned in-person fundraising events may be cancelled or significantly scaled back due to health and safety concerns. This will likely reduce the anticipated revenue and donor engagement from these events.
- **Donor Engagement:** The inability to host physical events may also diminish the personal connection and engagement we typically rely on to motivate donors.
- **Overall Strategy:** These developments necessitate a re-evaluation of our fundraising approach, with a potential shift towards virtual events, online campaigns, and alternative methods of donor outreach.

**Proposed Actions:**

- **Virtual Fundraising Alternatives:** We will explore the feasibility of replacing in-person events with virtual fundraising activities, such as online auctions, virtual donor meet-and-greets, and social media campaigns.
- **Enhanced Digital Outreach:** We plan to intensify our digital marketing efforts to maintain donor engagement and compensate for the loss of physical events.
- **Revised Budget and Timeline:** We will reassess the budget and timeline to reflect the changes in scope and strategy, ensuring that resources are allocated effectively to the adjusted plan.

Based on our previous agreement, I understand that this change request will be recorded on the project's scope management plan's page with the following actions points:

- I recommend scheduling an urgent meeting to discuss these challenges
- Finalise a revised strategy that aligns with the current health advisories.
- Update current objectives and deliverables if applicable.

We must act swiftly to mitigate the potential impact on our fundraising goals and ensure the success of the initiative despite these unforeseen circumstances.

Please let me know your availability for a meeting at your earliest convenience.

Thank you for your understanding and prompt attention to this matter. I look forward to your feedback and suggestions on how best to navigate these challenges.

Best regards,

*Drew Maduro*

Director of Operations

VitalGift Blood Bank  
1 Quay Street, Penrith, NSW 2750  
Phone: 11 22 33  
www.vitalgift.com.au



Read the email above and respond to the variations according to the change control mentioned, as previously agreed, following these steps:

1. Add a **new section** to the 'Scope Management Plan' project page created in Task 4 using Asana or another project management software of your choice.
2. Name this new section: '**Response to health warning**'.
3. List all relevant action points mentioned in the email underneath as new tasks. Propose a due date for each task.
4. Review the project's scope statement and update to reflect the changes outlined in the email.
4. Review the project's objectives and deliverables created in Task 4 and make any modifications if applicable. If objectives and/or deliverables need to be updated, create tasks for each required modification.
5. Take a screenshot of the **project's page with the added new section, including the new tasks/action points** and insert it into the box provided.
6. Take a screenshot of the scope statement, and of the updated objectives and/or deliverables (if applicable). In Asana this will be under 'Overview'. Insert the screenshot into the box provided.

<<Insert your screenshot/s here>>

## Assessor Instructions

Student must create a 'Response to health warning' section to the Scope Management Plan as outlined above with the given tasks and insert a screenshot. Student must provide a screenshot of the updated scope statement, and, if applicable, of the updated objectives and deliverables as well.

Task 4's updated sample scope statement would be: 'This project involves planning, executing, and monitoring a comprehensive fundraising campaign, now adapted to focus on virtual events and digital outreach due to the bird flu outbreak. It also includes the allocation of raised funds to infrastructure and operational improvements while ensuring compliance with health and safety guidelines.' Sample objectives and deliverables don't require update. All tasks must have a realistic due date added.

See a sample screenshot of the Scope Management Plan with the new section below:

The screenshot shows a project management interface for 'VitalGift Scope Management Plan'. The interface includes a navigation bar with options like Overview, List, Board, Timeline, Dashboard, Calendar, Workflow, Messages, and Files. Below the navigation bar is a table of tasks. The tasks are organized into two sections: a main list and a section titled 'Response to health warning'. Each task has a status (checked), a name, an assignee (represented by a person icon), and a due date.

Task name	Assignee	Due date
✓ Develop a comprehensive Fundraising Campaign Plan	[Person Icon]	29 Sep
✓ Create a Project Scope Management Plan using the chosen project manager	[Person Icon]	1 Oct
✓ Design a targeted campaign	[Person Icon]	2 Oct
✓ Develop a comprehensive report detailing the activities	[Person Icon]	3 Oct
Add task...		
▼ Response to health warning		
✓ Meeting to discuss the challenges	[Person Icon]	4 Nov
✓ Finalise a revised strategy	[Person Icon]	5 Nov
✓ Update scope management plan	[Person Icon]	1 Nov
Add task...		

## TASK 5

In the local newspaper you discovered an image of a volunteer fundraiser in a VitalGift T-shirt with a member of the community. The image was taken at the local shopping centre. Upon investigation, you have discovered that some of the volunteers who received a VitalGift T-shirt early on, were not notified about the health warning and the changes in the campaign.

Write an email to Jess Yun and the project team to report this non-compliance and suggest relevant actions for mitigation.

## Assessor Instructions


Student must write an email to Jess Yun and the project team to report this non-compliance and suggest relevant actions for mitigation.

A sample email is provided below.

From	<<Your Name>>
To	Jess Yun, Project team
Subject	<<type your subject>> For example: Non-compliances with VitalGift fundraising campaign
Attachments	<<Write the attachment/s name>> N/A
<p>&lt;&lt;write your 200-300 words email here &gt;&gt;</p> <p>For example:</p> <p>Dear Team,</p> <p>I hope this message finds you well.</p> <p>I need to bring to your attention an important issue regarding our fundraising campaign. It has come to our notice that a volunteer fundraiser was recently photographed wearing a VitalGift T-shirt at a local shopping centre. Unfortunately, it appears that some volunteers who received these T-shirts were not informed about the recent health warning and subsequent changes to our campaign strategy.</p> <p><b>Issue Details:</b> Non-Compliance: The presence of volunteers at in-person events is a direct violation of our revised project scope, which now requires all activities to be virtual or digital due to the bird flu outbreak.</p> <p><b>Impact:</b> This oversight could potentially undermine our efforts to comply with health and safety guidelines and disrupt our fundraising objectives.</p> <p><b>Action Required:</b> <b>Immediate Notification:</b> All volunteers must be urgently notified about the change in the campaign strategy and instructed to cease any in-person activities.</p> <p><b>Review and Update:</b> We need to review our communication process to ensure that all volunteers and stakeholders are up to date with the latest project guidelines.</p> <p><b>Corrective Measures:</b> Implement corrective actions to prevent further non-compliance, such as updating all campaign materials and ensuring that future outreach aligns with our revised scope.</p> <p>I recommend we hold a brief meeting to discuss this issue in detail and outline specific steps for addressing it. Please let me know your availability for a meeting or if you have any immediate concerns.</p> <p>Thank you for your prompt attention to this matter.</p> <p>Kind regards, Student/s name</p>	

## TASK 6

At the completion of the project CBSA received the following email from Drew Maduro:

		<b>Date</b> Friday, 23 December 202x
		<b>From</b> Drew Maduro
		<b>Subject</b> Thank you
		<b>Attachments</b>

Dear CBSA Team,

I hope this message finds you well.

On behalf of VitalGift, I want to extend our heartfelt thanks for your exceptional support and collaboration throughout our recent fundraising campaign. Despite the challenging circumstances brought about by the health restrictions, your expertise and guidance were instrumental in making our campaign a tremendous success.

We are thrilled to report that a total of \$500,000 was raised during the online fundraising campaign.

While the health restrictions prevented us from increasing the number of blood donations as planned, the funds raised will significantly contribute to our infrastructure and operational improvements, ensuring we can better serve our community in the future.


We truly appreciate your dedication and support, which played a crucial role in the success of this campaign. We look forward to the opportunity to work with you again on future projects.

Thank you once again for your invaluable contribution.

Best regards,  
*Drew Maduro*

Director of Operations

VitalGift Blood Bank  
 1 Quay Street, Penrith, NSW 2750  
 Phone: 11 22 33  
 www.vitalgift.com.au



Read the email carefully, then answer the following questions:

**Question 1**

Explain whether the project was successful in achieving the project's defined outcomes based on Drew's feedback. You may want to review the project initiation documentation and project briefing from Task 1 to be able to compare the outcome with the original fundraising goal.

[Approximate word count: 50-80 words]

**Assessor instructions:** Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:

- be within the specified word limit
- reflect the characteristics described in the exemplar answer
- explain whether the project was successful in achieving the project's defined outcomes.

A sample answer is provided below.

Based on Drew's feedback and reviewing the project's briefing, the project was successful in achieving its defined outcomes as they raised \$300,000 more than expected (initial goal was \$200,000).

Campaign Effectiveness: The shift to an online-focused strategy proved highly effective, demonstrating the power of digital engagement in achieving our fundraising objectives.

## Question 2

Considering the information provided regarding the project throughout Tasks 1-6, suggest **three [3]** potential improvements that CBSA may implement for future projects.

[Approximate word count: 5-50 words each]

**Assessor instructions:** Student responses are likely to include different wording than the sample answer provided. However, the acceptable responses must:

- be within the specified word limit
- reflect the characteristics described in the exemplar answer
- suggest three [3] potential improvements that CBSA may implement for future projects.

A sample answer is provided below.

1.	<b>Enhanced Volunteer Communication and Training</b>  Develop a more robust communication plan and training program for volunteers, ensuring they are promptly updated on any changes in campaign strategy, health guidelines, and role expectations. This will help avoid non-compliance issues and ensure all volunteers are aligned with the current objectives and safety protocols.
2.	<b>Diversified Fundraising Strategies</b>  Broaden the range of online fundraising strategies to include a mix of virtual events, social media challenges, peer-to-peer fundraising, and partnerships with influencers or businesses. This can increase reach and engagement, potentially leading to even higher fundraising outcomes and a more resilient campaign strategy.
3.	<b>Improved Data Tracking and Reporting</b>  Implement more comprehensive data tracking and reporting tools to monitor real-time performance, donor engagement, and financial metrics throughout the campaign. This will allow for quicker adjustments to strategies, better analysis of campaign effectiveness, and more informed decision-making for future initiatives.

Additional responses:

- **Risk Management:** Implement a robust risk management plan that identifies potential risks early and develops strategies to mitigate them. This reduces the likelihood of project disruptions and helps in managing unexpected challenges more effectively.

**Assessment checklist:**

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

Task 1	Complete table	<input type="checkbox"/>
Task 2	Write an email regarding the project's key information	<input type="checkbox"/>
Task 3	<ul style="list-style-type: none"> <li>• Create Scope Management Plan using a project management software</li> <li>• Provide screenshot/s</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
Task 4	<ul style="list-style-type: none"> <li>• Respond to variation</li> <li>• Provide screenshots</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
Task 5	Write an email to communicate non-compliance	<input type="checkbox"/>
Task 6	Respond to 2 questions related to the scenario provided	<input type="checkbox"/>



**Congratulations, you have reached the end of Assessment 3!**

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