

Assessment Resource Summary

Unit Details	U - 7 BSBPMG522 - Undertake project work	
Assessment Type	This is a summative assessment , which requires each student to have adequate practice prior to undertaking this assessment	
Assessment Methods	Q/A, Case study, Report	Assessment 1
	Project, Case study	Assessment 2
	Q/A, Case study	Assessment 3
	Q/A, Case study	Assessment 4
	Q/A, Case study	Assessment 5

ASSESSMENT 1 – STUDENT INFORMATION

Instructions for Students:

Whilst researching and writing your project it is important to:

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Assessment 1 – Define project

(Time allocated to finish the assessment – 3 hours)

PART A

1. List and describe at least five features that must be included in a project scope document.
2. What are the four project constraints and why are they considered constraints?
3. Provide relevant work examples of stakeholders and explain their role in a project.
4. Explain when you might need to seek clarification from your delegating authority regarding project parameters. Provide examples.
5. For a project in which you were assigned as the project manager, explain how you would identify the limits of your responsibility. Provide examples of the types of questions you might need to ask and to whom you would direct them.
6. Projects often overlap, co-exist or coincide within an organization. Describe the approach you would take to clarify the relationship between a project you were managing, and other projects that may be occurring within your organization.
7. Explain the importance of aligning your project with the organization's goals, objectives and overall operations.
8. List and describe the five basic categories of resources required during a straightforward project.

Part B: Case study

Use a project you are responsible for in your organization or use the following case study. Complete tasks 1 to 9.

Organization

You are Alexis Schuler, the Production Manager at Red, a magazine publishing company. Red publishes 10 different magazines – some quarterly, some monthly. All of the publications are undertaken on a contract basis for large organizations, government departments and associations.

Staff

The company has 36 permanent employees including production staff, editors and writers, marketing, sales, advertising and support staff. Key staff include:

- Meg Natoli, Company Accountant: Meg has a team of three accounts staff reporting to her and who also look after procurement.
- Byron Page, Sales Manager: Byron's team includes three advertising sales staff, two marketing coordinators and three account managers. All contact with clients is managed via Byron's team, which also handles any customer-service-related queries.
- Sandra Ngo, Editorial Manager: Sandra's team of six includes three editors and two staff writers, Sandra and another of her team members also manage the company's quality program, which is an internationally recognized quality accreditation; she also uses a large number of freelance writing staff.
- Bob Breman, IT Manager: Bob and his assistant manage the company's IT needs.
- Stella Galanis, Office Manager: Stella is also Nick's Personal Assistant and two staff report to her who share general office support and reception duties. Stella and her team look after any compliance-related issues, such as workplace safety procedures, and they also manage the content of the company's intranet site.
- Production Manager: Your production team of eight includes graphic designers, production coordinators and support staff who also work as proofreaders. You have been the Production Manager at Red for six years. You joined the company when it was quite small and have been able to grow with it, increasing your expertise, experience and the size of your team every year.

Meg, Byron, Sandra, Bon, Stella and you all report to the Managing Director, Nick Mitchell.

The Project

You have just attended a meeting with Nick, and he has informed you that Red has outgrown its original offices and is moving to a new location, close by but larger, newer and more appropriate to the company's needs. He tells you that he'd like you to be the project manager for the move and you to ensure that the company moves from one location to another with minimal disruption to employees, suppliers and customers. The only other person who knows about the move is Meg, the Company Accountant.

Nick has given you some sheets of paper with the address of the new office, a floor plan and a draft budget that Meg prepared. Meg has also made a few notes and sourced a few indicative prices for items she believes will be the most expensive, such as the office fit-out, which is necessary so that she can assign a budget to the project. Nick says the lease on the current premises ends in two months and that the new office is available next week.

He asks you to take the information away, examine it and let him know tomorrow if you'd like to do it. He says that you would take on the project in addition to your regular duties but that some of your duties could be assigned to other senior members of your team.

After you've thought about it that night, you decide to take on the project. The work will be good experience for you and may lead to other interesting projects within Red.

Meg's budget and project notes reveal that you will be the only staff member assigned to the project and you have a budget of \$120000 to cover moving costs, office fit-out, additional IT hardware, new stationery and the costs of communicating your changed address via a mail-out need to be researched very thoroughly before the project budget can be finalized.

You meet with Nick early that morning. He shakes your hand and says, 'Congratulations – I'm sure you'll do a great job. I'll send an email to all the staff this morning letting them know that we're moving to better premises soon and you will be managing the project. I'll ask everyone to keep it to themselves for the time being, but it's up to you to manage the rest'.

You decide that you'd better get moving yourself and work out what you're going to do to make this happen.

1. Explain how you will identify and understand the scope of the project you have been assigned. What documentation do you think you will need to source?
2. For each of the stakeholder groups in the following list, identify who within the organization fits into these categories and why they are important in the context of the project.
 - a. Project sponsor
 - b. Manager, employees and relevant key personnel
 - c. Any other staff members who have special responsibilities
 - d. Customers
 - e. Funding bodies

- Construct a contact table similar to the one that follows. Fill it out with as much details as possible, explaining that the various authorities are; why and when you should contact them and how to contact them.

Delegating authority	Why/when to contact	How to contact

- Reproduce the following table to help you identify whether you have the information you need to begin work on your project. Indicate whether the information you need is available in the 'Information available?' column with a Yes or No. then complete the table by indicating whether you have gained this information or whether it is still needed.

Project parameter	Information available?	Information gained or needed?
Scope of the project		
Project outcomes		
Legislative requirements		
Quality standards affected		
Time lines		
Finances		
Integration with organizational goals		
Risks		
Stakeholder's reporting requirements		
Resources required		
Organizational procurement processes		
Resources available		
Resources that must be obtained		

- Explain the issues you will raise, and who you will speak to, as you clarify the limits of your responsibilities as Project Manager.
- Explain how you will understand what resources are available to you during this project and how you will access them. Who will you consult to help you gather this information and answer your queries?
- In the context of this project, explain why it is important to understand stakeholders' expectations of you generally as well as specifically with regard to reporting and information flow throughout the project. What will you do to ensure the reports you produce meet the needs of stakeholders?
- Explain how you will investigate whether the project is linked to other projects and how it reflects your organization's objectives? How will you clarify any further questions you have?

ASSESSMENT 2 – STUDENT INFORMATION

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Assessment 2 – Develop project plan

(Time allocated to finish the assessment – 3 hours)

PART A

1. Provide a description and/or explanation of each of the following elements of a project plan.
 - a. A work breakdown schedule
 - b. Key designated milestones and deadlines
 - c. Budget and costs (direct and indirect)
 - d. Project scope
 - e. Risk analysis
 - f. The standard (or quality) of work
 - g. The list of assumptions
 - h. The relationship between tasks

2. Explain the use of each of the following project management tools:
 - a. Logistics support analysis
 - b. Lifecycle cost analysis
 - c. Cost schedule control system
 - d. Critical path method
 - e. Gantt and bar charts
 - f. PERT charts

3. List and describe the four categories of risk that may be addressed in a project plan, including WHS risk.

4. What process is required to gain budgetary approval? Who might you gain approval from?

5. Explain why it is important to consult team members when preparing a project plan.

6. In your organization, from whom would you gain final project approval? Describe a situation that might lead to this requirement.

Part B – Case study

Follow on from the analysis of the project you are currently working on or the case study that continues from Assessment activity 1 and complete the tasks that follow.

Case study (cont'd)

The Red office move is planned

You've gathered all the information you need to fully understand your role as Project Manager for Red's impending move to new premises.

Nick has asked you to present the final plan to the management team the following week.

Gathering information for the project plan

You will need to collect some information. You meet with other managers, talk with staff in other organizations, research some information on the internet and talk with colleagues and friends who you know have moved offices recently. The following is a summary of the information you gather:

1. You find out that Red has project software that you could use.
2. Meg tells you that, for a project she managed last year, she created her own tools and forms to help her and has offered them to you.
3. Bryon is very concerned that customers will need to have clear information on where Red is moving; he and his team would like to work through some of these issues with you and devise some risk-management plans to help avoid problems.
4. Sandra has a problem in that her editorial work can't be disrupted; you know that your own team of designers is in the same situation, so your plan will need to manage the fact that staff in these two departments in particular can't lose any time. Bryon has confirmed that his team can work from home using their laptops for a day or two if necessary. Phone lines will need to be uninterrupted as well.
5. Bob has given you a list of what needs to happen in the IT area before anyone can get their computers up and running. It reads like this:
 - Rewire and network new offices (three days)
 - Backup of data (overnight)
 - Pack up server, phones and computers (Half day)
 - Set up computers and phone access for all staff (one day)
 - The new hardware required for the new offices will cost \$10,000-\$20,000, but will have to get quotes. This will take about two days.

6. You have checked with several major office fit-out companies and have found out that fit-out of a space the size of your new offices will take two days of installation and about two weeks of construction. They will need three hours to measure up and can provide a design concept and quotes within five days. Rough estimates of fit-out provided to you over the phone are between \$40,000 and \$70,000.
7. Nick has confirmed that it's OK to plan some work involved in the move over weekends; any staff (such as IT staff) that are called in on these days can have time off in lieu.
8. Stella has agreed that one of her staff members can provide you with limited ad hoc assistance throughout the project, on her approval.
9. Meg has provided you with hourly rates for employees as follows:
 - Alexis (you): \$60
 - Office support staff: \$30
 - Bob: \$65 and Bob's assistant: \$55

She has also provided you with other rates:

- Fringe benefits: 10 per cent of hourly rates
 - Indirect costs: \$100 per day
10. You've jotted down a list of things in no particular order but know that you'll need to re-prioritise this list as some activities are dependent on others:

Staffs needs to be given a schedule of the move ahead of time and again afterwards, on multiple occasions.

- Staffs needs to be told what they need to do.
- Customers need to be informed of the move ahead of time and again afterwards, on multiple occasions.
- New stationery needs to be printed.
- Banks, suppliers, Yellow Pages and White Pages all need to be advised.
- Staffs need to be shown their new desks and new parking location
- Office supplies and other items need to be boxed and moved.
- A removals company needs to be contracted.
- Staffs need to pack up their supplies so they can locate items after the move. You need to put a notice in the window of your old offices with your new address.

1. List the major tasks involved in the project in the order they will be carried out.
2. Develop a task breakdown for each major activity, including dependencies and actual or estimated time lines using the following format.

Major task	Time frame	Dependencies
1. Sub-task		
2. Sub-task		
3. Sub-task		
4. Sub-task		
5. Sub-task		

3. Decide how you will assign tasks to team members and others within the organization and external to it, if necessary. Describe what tasks will be assigned to whom and why. List the tools you will use to do this.
4. Describe what project management tools you will use for your plan and why. Explain how you plan to develop any tools yourself.
5. Using a project management tool, create a project time line and identify a critical path for the project that shows major milestones as well as key activities.
6. Develop a comprehensive risk management plan, identifying all possible risks and ways those risks will be avoided or minimized.
7. Develop a project budget based on the example given in this chapter or on one you are familiar with.
8. Discuss how you will consult with and seek the feedback and opinions of team members and other stakeholders during this planning phase. Describe the benefits of this consultation.
9. Explain the final steps you will take to ensure the project plan is likely to gain approval from the management team.
10. Prepare and present the final project plan approval.

ASSESSMENT 3 – STUDENT INFORMATION

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Assessment 3 – Administer and monitor project

(Time allocated to finish the assessment – 3 hours)

Part A

1. Describe three methods of providing information to project team members to ensure they are clear about their role and responsibilities.
2. Briefly define each of these terms and describe why they are effective in supporting a project team:
 - a. Encouragement
 - b. Feedback
 - c. Learning and development
 - d. Regular meetings
 - e. Supervision, mentoring and coaching
3. What resources could you provide to support your project team to complete their tasks on time and within budget?
4. What methods of record keeping could you provide for regular project correspondence? Why would you need to do this?
5. What considerations would you give to monitoring the following resources?
 - a. Human resources
 - b. Physical resources
 - c. Financial resources
6. To whom would you need to report project achievements? Why?
7. What steps could you take to reduce the risk of a budgetary blow out? Explain how these steps would successfully reduce this risk.
8. How could you be sure you were able to achieve all project deliverables?

Part B: Case study

Use a project you are responsible for in your organization or use the following case study (continued from Assessment activity 2). Complete tasks 1 to 7.

Case study (cont'd)

The Red office move is implemented

Your plan was signed off and approved by the management team. It was quite detailed and you spent a lot of time on it, so you're very glad your hard work paid off.

Now it's time to actually move offices.

You are relying on Red employees (who are, in a way, the project team member) to pack up their own desks and complete other tasks as the move happens.

You have two employees who will need assistance to pack their desks up. One person is away on leave and is not returning until two weeks after the move; another has a broken arm and, although they are at work, can't do all their normal tasks.

Your manager, Nick wants you to keep a record of everything that happens as the move takes place.

1. What will you do to ensure that all your team members know their responsibilities in relation to the project and are able to effectively complete the tasks assigned to them?
2. How will you work around the problem of staff being on leave? What issues will you need to consider if you had team members with impairments or disabilities?
3. Describe in detail the system you will use, and why you have chose it, to record:
 - Costs
 - Resources used
 - Project time lines
 - Information issued to staff
 - Information issues to customers
 - Records of project reports
 - Contracts issued to suppliers

4. Describe the systems you will use to monitor the progress of your project.
 - a. Who will you consult with to help you design the system?
 - b. Who will be responsible for monitoring activities?
 - c. What will be measured?
 - d. As project manager, what will you expect to gain from implementing monitoring system?

5. Create your own project reporting templates for the following:
 1. Weekly staff updates
 2. Monthly reports to the management team (or stakeholders)
 3. Weekly reports to your own manager or project sponsor
 4. Milestone or monthly reports to stakeholders

6. Explain your risk-management methodology. Why is ongoing risk management important? How will you ensure you (and your team) are prepared to implement risk-management plans? How will you meet the challenge of unforeseen risks arising?

7. In the context of your project, what are the project deliverables you will use as a measure of your own success? How will you test whether they have been achieved?

ASSESSMENT 4 – STUDENT INFORMATION

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Assessment 4 – Finalise project

(Time allocated to finish the assessment – 3 hours)

PART A

1. List and describe five reasons why financial records must be finalized at the end of a project.
2. Explain why a manager must handle the completion of a project in a sensitive manner.
3. Describe how you would manage the reassignment of a full-time staff member who had been seconded to your project for the last month. Assume the person has an existing role to return to.
4. List and define who may need to provide final sign-off on a project.

PART B

Building on your answers from the previous activities, complete the following seven tasks in the context of your own project or the Red Office case study.

1. Describe the types of financial records associated with the project.
2. Describe how you collated and checked the financial records for accuracy.
3. Describe the process you followed for checking and reviewing the financial records to ensure all costs, invoices and internal charges incurred during the project's lifetime have been processed appropriately and all project accounts have been closed off. Include any regulatory/legislative standards that apply.
4. Describe the process you would follow to assign/reassign staff after the project was completed.
5. Prepare a final project report with clearly defined sections. Include relevant documents as attachments.
6. Describe the procedures you would follow to obtain sign-offs from appropriate personnel.
7. Describe the information you would need to get signed off.

ASSESSMENT 5 – STUDENT INFORMATION

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Assessment 5 – Review project

(Time allocated to finish the assessment – 3 hours)

PART A

1. Discuss why a project review is important. What would you hope to learn from a comprehensive review of a project you have just completed?
2. How does a project review assist in meeting organizational requirements? Explain the benefits.
3. What tools would you use to compare your actual progress and achievement throughout the project against those you and your team planned?
4. Why is it important to involve team members in a project review?
5. What type of reporting requirements do you have within your organization (or one you are familiar with) to report on the final review of a project? What benefit does having a reporting system provide?

Part B

1. Explain how you would manage and participate in the review phase, either for a project in your own workplace or as the project manager in the Red case study. Specifically, focus on how you would involve your team members and how lessons would be documented and reported.
2. Using a project in your workplace or the Red case study, design a survey that asks staff for their feedback on how the project was conducted, so you can evaluate how well you performed and so you can gather data for future organizational projects. Include areas in the survey that ask staff about your own performance; the quality of communications; the impact of the project on their roles and the likelihood the organization will encounter problems in the medium to long term as a result of the project. Explain how you would distribute the survey and explain how you will evaluate the responses.