



**SUCCESSION
TRAINING**

BSB51415 Diploma of Project Management



Integration Management

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Version control & document history

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INTRODUCTION

Assessment is a difficult process – we understand this and have developed a range of assessment kits, such as this, to facilitate a seamless process for both the assessor and the learner being assessed.

There are a number of characteristics of assessment, ranging from *subjective assessment* (which is based on opinions and feelings), to *objective assessment* (which is based clearly on defined processes and specific standards). Nearly all assessment involves a mixture of both types of assessment because it is almost impossible to eradicate the subjectivity humans carry into the process of assessing. The goal in developing and implementing these assessment kits is to work towards the objective end as far as possible and to reduce the degree of opinions and feelings present.

WHAT IS COMPETENCY BASED ASSESSMENT

The features of a competency based assessment system are:

- It is focused on what learners can do and whether it meets the criteria specified by industry as competency standards.
- Assessment should mirror the environment the learner will encounter in the workplace.
- Assessment criteria should be clearly stated to the learner at the beginning of the learning process.
- Assessment should be holistic. That is it aims to assess as many elements and/or units of competency as is feasible at one time.
- In competency assessment a learner receives one of only two outcomes – competent or not yet competent.
- The basis of assessment is in applying knowledge for some purpose. In a competency system, knowledge for the sake of knowledge is seen to be ineffectual unless it assists a person to perform a task to the level required in the workplace.
- The emphasis in assessment is on assessable outcomes that are clearly stated for the trainer and learner. Assessable outcomes are tied to the relevant industry competency standards where these exist. Where such competencies do not exist, the outcomes are based upon those identified in a training needs analysis.

Definition of competency

Assessment in this context can be defined as:

- The fair, valid, reliable and flexible gathering and recording of evidence to support judgement on whether competence has been achieved. Skills and knowledge (developed either in a structured learning situation, at work, or in some other context) are assessed against national standards of competence required by industry, rather than compared with the skills and knowledge of other learners.

THE BASIC PRINCIPLES OF ASSESSING NATIONALLY RECOGNISED TRAINING

Developing and conducting assessment, in an Australian vocational education and training context, is founded on a number of basic conventions:

The principles of assessment

- Assessment must be valid
 - Assessment must include the full range of skills and knowledge needed to demonstrate competency.
 - Assessment must include the combination of knowledge and skills with their practical application.
 - Assessment, where possible, must include judgements based on evidence drawn from a number of occasions and across a number of contexts.
- Assessment must be reliable
 - Assessment must be reliable and must be regularly reviewed to ensure that assessors are making decisions in a consistent manner.
 - Assessors must be trained in national competency standards for assessors to ensure reliability.
- Assessment must be flexible
 - Assessment, where possible, must cover both the on and off-the-job components of training within a course.
 - Assessment must provide for the recognition of knowledge, skills and attitudes regardless of how they have been acquired.
 - Assessment must be made accessible to learners through a variety of delivery modes, so they can proceed through modularised training packages to gain competencies.

- Assessment must be mutually developed and agreed upon between assessor and the assessed.
- Assessment must be able to be challenged. Appropriate mechanisms must be made for reassessment as a result of challenge.

The rules of evidence (from *Training in Australia* by M Tovey, D Lawlor)

When collecting evidence there are certain rules that apply to that evidence. All evidence must be valid, sufficient, authentic and current;

- Valid
 - Evidence gathered should meet the requirements of the unit of competency. This evidence should match or at least reflect the type of performance that is to be assessed, whether it covers knowledge, skills or attitudes.
- Sufficient
 - This rule relates to the amount of evidence gathered. It is imperative that enough evidence is gathered to satisfy the requirements that the learner is competent across all aspects of the unit of competency.
- Authentic
 - When evidence is gathered the assessor must be satisfied that evidence is the learner's own work.
- Current
 - This relates to the recency of the evidence and whether the evidence relates to current abilities.

THE DIMENSIONS OF COMPETENCY

The national concept of competency includes all aspects of work performance, and not only narrow task skills. The four dimensions of competency are:

- Task skills
- Task management skills
- Contingency management skills

REASONABLE ADJUSTMENT

Adapted Reasonable Adjustment in teaching, learning and assessment for learners with a disability - November 2010 - Prepared by - Queensland VET Development Centre

Reasonable adjustment in VET is the term applied to modifying the learning environment or making changes to the training delivered to assist a learner with a disability. A reasonable adjustment can be as simple as changing classrooms to be closer to amenities, or installing a particular type of software on a computer for a person with vision impairment.

Why make a reasonable adjustment?

We make reasonable adjustments in VET to make sure that learners with a disability have:

- the same learning opportunities as learners without a disability
- the same opportunity to perform and complete assessments as those without a disability.

Reasonable adjustment applied to participation in teaching, learning and assessment activities can include:

- customising resources and assessment activities within the training package or accredited course
- modifying the presentation medium learner support
- use of assistive / adaptive technologies
- making information accessible both prior to enrolment and during the course
- monitoring the adjustments to ensure learner needs continue to be met.

Assistive / Adaptive Technologies

Assistive / adaptive technology means 'software or hardware that has been specifically designed to assist people with disabilities in carrying out daily activities' (World Wide Web Consortium - W3C). It includes screen readers, magnifiers, voice recognition software, alternative keyboards, devices for grasping, visual alert systems, digital note takers.

IMPORTANT NOTE

Reasonable adjustment made for collecting candidate assessment evidence must not impact on the standard expected by the workplace, as expressed by the relevant Unit(s) of Competency. E.g. If the assessment was gathering evidence of the candidates competency in writing, allowing the candidate to complete the assessment verbally would not be a valid assessment method. The method of assessment used by any reasonable adjustment must still meet the competency requirements.

THE UNITS OF COMPETENCY

The units of competency specify the standards of performance required in the workplace.

This assessment addresses the following unit of competency from **BSB51415 Diploma of Project Management**:

BSBPMG521 – Manage Project Integration

1. Establish project
2. Undertake project planning
3. Execute project in work environment
4. Manage project control
5. Manage project finalisation

BSBPMG516 – Manage Project Information and Communication

1. Plan information and communication processes
2. Implement project information and communication processes
3. Assess information and communication outcomes

For complete copies of the above unit of competency:

Download them from the TGA website: www.training.gov.au

ASSESSMENT REQUIREMENTS

The assessment requirements specify the evidence and required conditions for assessment.

Each unit of competency can be unbundled to reveal three key assessment components:

- Performance Evidence - describes the subtasks that make up the element of the unit
- Knowledge Evidence - describes the knowledge that must be applied in understanding the tasks described in the elements
- Assessment Conditions - describes the environment and conditions that assessments must be conducted under

The associated assessment tool in this kit covers all of these components as detailed in the matrix to follow:

	Units of competency	
	BSBPMG516	BSBPMG521
Assessment Activities		
Case Studies	✓	✓

BSBPMG521 – Manage Project Integration

This unit describes the skills and knowledge required to integrate and balance overall project management functions of scope, time, cost, quality, human resources, communications, risk and procurement across the project life cycle; and to align and track project objectives to comply with organisational goals, strategies and objectives.

It applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

Performance evidence

Evidence of the ability to:

1. work closely with others to integrate all project management functions across a project life cycle according to organisational objectives
2. negotiate with internal and external stakeholders
3. create accurate project management documentation
4. make suggestions for improvements to managing project integration in the future.

Knowledge evidence

To complete the unit requirements safely and effectively, the individual must:

1. summarise project governance models
2. describe range of methodologies to break project objectives into achievable project deliverables
3. outline role of project life cycle stages, phases and structures relevant to industry and project context
4. identify and describe appropriate organisational documentation for recording strategies and goals for integration processes.

Assessment conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

1. project documentation
2. case studies and, where possible, real situations
3. interaction with others.

BSBPMG516 – Manage project information and communication

This unit describes the skills and knowledge required to link people, ideas and information at all stages in the project life cycle. Project communication management ensures timely and appropriate generation, collection, dissemination, storage and disposal of project information through formal structures and processes.

It applies to individuals responsible for managing and leading a project in an organisation, business, or as a consultant.

Performance evidence

Evidence of the ability to:

1. develop a communication management plan and an information system for a specific project
2. implement a project information system with a systematic approach to storage, searching, retrieval and archiving of relevant information
3. implement and maintain communication processes
4. review project outcomes and document suggestions for improvements to managing project information and communication for future projects.

Knowledge evidence

To complete the unit requirements safely and effectively, the individual must:

1. explain alternative communication methods and media and their application on various projects
2. identify effective project-management information systems and their various applications
3. explain methods used to evaluate information systems and communication processes.

Assessment conditions

Assessment must be conducted in a safe environment where evidence gathered demonstrates consistent performance of typical activities experienced in the management and leadership – project management field of work and include access to:

1. project communication and information management documentation
2. examples of how communication was managed on projects
3. case studies and, where possible, real situations.

ASSESSMENT METHODS

There are five (5) Assessment Workbooks for the course. This is **Workbook 5**.

Theory Workbooks

The Theory Workbooks contain two assessment methods:

1. **Written Questions** – A set of generic and workplace questions testing the student's general knowledge and understanding of the general theory behind the unit.
2. **Case Studies** – A set of hypothetical questions to test the student's analytical skills in project problem solving. Students will be provided with a set of project management documents to analyse.

Workbook 1 – The Project Life Cycle

Workbook 2 – Constraint Management

Workbook 3 – Human Resource Management

Workbook 4 – Risk Management

Workbook 5 – Integration Management

Project Practical Assessment

Each unit of competency will be assessed practically, requiring the collation of evidence to demonstrate the student's skill, plus a suitable observer to verify the student's ability.

RESOURCES REQUIRED FOR ASSESSMENT

Assessor to provide:

- Case studies and simulations
- Information about work activities

The student to provide:

- Computer with internet access, Microsoft Word, Microsoft Project, Adobe Acrobat Reader
- Access to email

INSTRUCTIONS TO ASSESSOR

This is a compulsory assessment to be completed by all students. This assessment tests the student's ability to understand the underpinning generic knowledge related to this unit of competency

The assessor guide provides model answers to all the questions. Where answers are required, this is specified in the question to avoid ambiguity. The model answer will be in these cases provide a complete list of possible answers that are considered acceptable. For instance if a question requires the student to list three options, then their response must include three of the items listed in the model answer.

***Note to assessors:** contact details are requested from observers in the feedback forms in case you will have to call them to verify content of the feedback forms.*

IMPORTANT REMINDER

Candidates must achieve a satisfactory result to ALL assessment tasks to be awarded COMPETENT for the units relevant to this cluster.

INSTRUCTIONS TO STUDENT

The Written Questions Assessment covers generic underpinning knowledge of basic project management terms and concepts. These questions are all in a short answer format. The longer questions requiring creative thought processes are covered in the case studies assessment. **You must answer all questions using your own words.** However, you may reference your learner guide, *Guide to the Project Management Body of Knowledge (PMBOK Guide)*, and other online or hard copy resources to complete this assessment.

Some questions cover processes you would be likely to encounter in a workplace. Ideally, you should be able to answer these questions based on the processes that are currently in place in your workplace. If this is not the case, then answer the questions based on processes that should be implemented in your workplace.

If you are currently managing a project, you may answer these questions based on your own workplace. Otherwise, consider what you should do if you were managing a project.

ASSESSMENT WORKBOOK COVERSHEET

WORKBOOK:	Workbook 5
TITLE:	Integration Management
FIRST AND SURNAME:	
PHONE:	
EMAIL:	

Please read the Candidate Declaration below and if you agree to the terms of the declaration sign and date in the space provided.

By submitting this work, I declare that:

- I have been advised of the assessment requirements, have been made aware of my rights and responsibilities as an assessment candidate, and choose to be assessed at this time.
- I am aware that there is a limit to the number of submissions that I can make for each assessment and I am submitting all documents required to complete this Assessment Workbook.
- I have organised and named the files I am submitting according to the instructions provided and I am aware that my assessor will not assess work that cannot be clearly identified and may request the work be resubmitted according to the correct process.
- This work is my own and contains no material written by another person except where due reference is made. I am aware that a false declaration may lead to the withdrawal of a qualification or statement of attainment.
- I am aware that there is a policy of checking the validity of qualifications that I submit as evidence as well as the qualifications/evidence of parties who verify my performance or observable skills. I give my consent to contact these parties for verification purposes.

Name :

Signature:

Date:

CASE STUDY

Instructions to Assessor

This assessment supports the industry requirement of inheriting a project that has issues. In real life project team members are more likely to enter a project whilst it is in progress and contains some 'baggage' than they are to enter a project at the start. This assessment demonstrates the student's problem solving abilities in such a situation.

A separate case study is provided for each subject. The case study will be based on a fictitious company and scenario. It will include a number of questions and all supporting documentation containing the information to answer the questions will be supplied.

Instructions to Student

These case studies are hypothetical situations which will not require you to have access to a workplace, although your past and present workplace experiences may help with the responses you provide. You will be expected to encounter similar situations to these in future as you work in a project team environment.

In the real world you are likely to encounter the situation where you enter a project, taking over from another project manager. The documentation that is handed over to you is not necessarily up to scratch, and there could be serious issues with the project. This assessment captures that real life scenario.

The case studies are the first part of dealing with "multiple complex projects" required in all the units of this subject. The other assessment covering this requirement is the practical assessment. When you have completed the case studies you will be able to commence the practical assessment which covers the generic skills needed to function as an effective project team member. This assessment on the other hand covers the application of the underpinning knowledge and background theory.

Introduction

You have been appointed as a project management consultant advisor to the project team at Awesome Landscapes Pty Ltd. Specifically you are required to provide independent advice on seeing their current project through the entire life cycle.

You have already provided advice to them in the previous four workbooks.

The project manager has advised the project is now complete, and is about to archive all the project documentation.

Your task is to evaluate the supplied project documentation and to ensure all due diligence has been completed.

You will need to compare the project plan with the previous version to ensure it is ready for closure.

[Project Charter version 4 \(.pdf\)](#)

[Project Plan version 4 \(.pdf\)](#)

[Project Gantt Chart version 4 \(.mpp\)](#)

[Project Gantt Chart version 4 \(.pdf\)](#)

[Project Network Diagram version 4 \(.pdf\)](#)

(username: cstclearner password: CstcPty@123)

Note: These documents were generated in year 2016. For the purpose of this assessment, refer to '2016' as the current year and '2017' as the succeeding year.

1. Sam has asked to you check the Project Plan for anything that is missing. He has been very busy but appears to have done all the necessary finalisation of the plan ready for sign off.

He has mentioned the final report or lessons learnt documentation has not been included, and the project archiving checklist have not been completed either. You will be assigned to complete these later.

Examine the Project Charter (version 4) and Project Plan (version 4) and identify four (4) things that are missing.

Guidance:

- a. Assume the Project Gantt Chart and the financial figures in the summary/detailed costing tables are up to date as these have already been audited. Also remember this final project plan is in draft, and will not be signed off until the final acceptance meeting in a few days' time.
- b. Take note of the following:
 - i. Version control.
 - ii. The updates from the project in the other workbooks you have completed in previous workbooks.
 - iii. Check the project archiving checklist for everything that should be included

Mapping: BSBPMG521 PC4.5 (p), PC5.2 (p)

- a.
- b.
- c.
- d.

Marking guide

Student must examine the Project Charter (version 4) and Project Plan (version 4) and identify four (4) things that are missing. Wording may vary, however, responses must be the same in thought and meaning with the benchmark answers provided.

Student must list any four (4) of the following (in any order):

- *All documentation regarding the replacement of the contractor.*
- *Addition of new staff, including modifications to organisation chart and all other HR related documentation.*
- *Risk review and all documentation of additional risks covered in workbook 4.*
- *All status reports written during the project.*
- *The issues register has not been complete.*
- *The project cash flow table and diagram have not been updated*

2. Sam is in the process of developing a set of Lessons Learnt Documentation for the project.
 - a. Access and review the four (4) previous workbooks you have completed and derive three (3) different lessons learnt throughout the project.
 - b. Document each lessons learnt using the Lessons Learnt Documentation Template provided. Use one template for each lessons learnt.

Mapping:

BSBPMG521 PC4.4 (p), PC5.4, PE3, PE4

BSBPMG16 PC3.1 (p), PC3.3, PE4

Marking guide

Student must:

- a. Access and review the previous three workbooks you have completed and derive three (3) different lessons learnt throughout the project.
- b. Document each lessons learnt using the Lessons Learnt Documentation Template provided. Use one template for each lessons learnt.

Responses will vary however, they must be consistent with the case study scenarios and project documentation provided in the four (4) previous workbooks. The Lessons Learnt Documentation Templates are populated with general guidelines for the assessor in assessing student's responses.

Lessons Learnt Documentation Template 1

Project Name	<i>Cascade Peak Chalets Landscaping Project</i>
Prepared by	<i>Student's Name</i>
Date	
Project Manager	Date must be after the final date of the Project Gantt Chart.
Lessons Learnt Number	Unique number for each template. At least three templates must be complete.
Lesson Learned Proposed Name:	Clearly and succinctly describes lesson learnt.
Project Team Role:	The role that the project team plays in ensuring the issue either doesn't happen again, or is managed to minimise impact.

Process Group*

The correct part of the project life cycle is selected below. One must be selected.

☐ Initiating
 ☐ Planning
 ☐ Executing
 ☐ Controlling
 ☐ Closing

Specific project management process being used:

The function of project management (scope, time, cost, quality, HR, communications, risk, procurement) and any process within the function relevant to the issue. Each of the nine functions must be covered at least once in between the three templates.

Specific practice, tool or technique being used:	
Must be specific describing what was being used to create the problem.	
What action was undertaken?	Description of the action that caused the problem.
What was the result?	Must be a description of the problem that occurred.
What might have been a more preferred result?	Must be the outcome that should have happened.
What might have created the more preferred result?	The actions or steps creating the above result.
What is the specific lesson learnt?	
Must show that “if we had have done x, then we would have achieved result y rather than z.”	
How could one identify a similar situation in the future?	
Must show the signs that show signs of the same mistake being made, and who should be looking out for them.	
What behaviour is recommended for the future?	
Must list the behaviour or attitudes of the relevant team members or managers to ensure the problem does not occur in the future.	
Where and how can this knowledge be used later in this current project?	
If the project is still in progress, then specify the tasks/stages that team members will need to monitor, and describe how the knowledge will be used.	
Who should be informed about this Lesson Learnt:	
(check one) At least one of these must be selected depending on the nature of the lesson.	
☐ Executive(s)	☐ Project Manager(s)
☐ Others	☐ Project team (s) ☐ All staff
How should this Lesson Learnt be disseminated?	
At least one must be selected.	
☐ E-mail	☐ Intranet/Web site
☐ Others	☐ Tip Sheet/FAQ ☐ Library

Lessons Learnt Documentation Template 2	
Project Name	<i>Cascade Peak Chalets Landscaping Project</i>
Prepared by	<i>Student's Name</i>
Date	
Project Manager	Date must be after the final date of the Project Gantt Chart.
Lessons Learnt Number	Unique number for each template. At least three templates must be complete.
Lesson Learned Proposed Name:	Clearly and succinctly describes lesson learnt.
Project Team Role:	The role that the project team plays in ensuring the issue either doesn't happen again, or is managed to minimise impact.
Process Group*	
The correct part of the project life cycle is selected below. One must be selected.	
☐ Initiating	☐ Planning
☐ Executing	☐ Controlling
☐ Closing	
Specific project management process being used:	
The function of project management (scope, time, cost, quality, HR, communications, risk, procurement) and any process within the function relevant to the issue. Each of the nine functions must be covered at least once in between the three templates.	
Specific practice, tool or technique being used:	
Must be specific describing what was being used to create the problem.	
What action was undertaken?	Description of the action that caused the problem.
What was the result?	Must be a description of the problem that occurred.
What might have been a more preferred result?	Must be the outcome that should have happened.
What might have created the more preferred result?	The actions or steps creating the above result.
What is the specific lesson learnt?	
Must show that "if we had have done x, then we would have achieved result y rather than z."	
How could one identify a similar situation in the future?	
Must show the signs that show signs of the same mistake being made, and who should be looking out for them.	
What behaviour is recommended for the future?	
Must list the behaviour or attitudes of the relevant team members or managers to ensure the problem does not occur in the future.	

Where and how can this knowledge be used later in this current project?			
If the project is still in progress, then specify the tasks/stages that team members will need to monitor, and describe how the knowledge will be used.			
Who should be informed about this Lesson Learnt:			
(check one) At least one of these must be selected depending on the nature of the lesson.			
☐	Executive(s)	☐	Project Manager(s)
☐	Others	☐	Project team (s)
☐		☐	All staff
How should this Lesson Learnt be disseminated?			
At least one must be selected.			
☐	E-mail	☐	Intranet/Web site
☐	Others	☐	Tip Sheet/FAQ
☐		☐	Library

Lessons Learnt Documentation Template 3	
Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Student's Name
Date	
Project Manager	Date must be after the final date of the Project Gantt Chart.
Lessons Learnt Number	Unique number for each template. At least three templates must be complete.
Lesson Learned Proposed Name:	Clearly and succinctly describes lesson learnt.
Project Team Role:	The role that the project team plays in ensuring the issue either doesn't happen again, or is managed to minimise impact.
Process Group*	
The correct part of the project life cycle is selected below. One must be selected.	
☐	Initiating
☐	Planning
☐	Executing
☐	Controlling
☐	Closing
Specific project management process being used:	
The function of project management (scope, time, cost, quality, HR, communications, risk, procurement) and any process within the function relevant to the issue. Each of the nine functions must be covered at least once in between the three templates.	
Specific practice, tool or technique being used:	
Must be specific describing what was being used to create the problem.	
What action was undertaken?	Description of the action that caused the problem.
What was the result?	Must be a description of the problem that occurred.
What might have been a more preferred result?	Must be the outcome that should have happened.

What might have created the more preferred result?	The actions or steps creating the above result.		
What is the specific lesson learnt?			
Must show that “if we had have done x, then we would have achieved result y rather than z.”			
How could one identify a similar situation in the future?			
Must show the signs that show signs of the same mistake being made, and who should be looking out for them.			
What behaviour is recommended for the future?			
Must list the behaviour or attitudes of the relevant team members or managers to ensure the problem does not occur in the future.			
Where and how can this knowledge be used later in this current project?			
If the project is still in progress, then specify the tasks/stages that team members will need to monitor, and describe how the knowledge will be used.			
Who should be informed about this Lesson Learnt:			
(check one) At least one of these must be selected depending on the nature of the lesson.			
☐	Executive(s)	☐	Project Manager(s)
☐	Others	☐	Project team (s)
		☐	All staff
How should this Lesson Learnt be disseminated?			
At least one must be selected.			
☐	E-mail	☐	Intranet/Web site
☐	Others	☐	Tip Sheet/FAQ
		☐	Library

3. Sam has asked you to write the final report for the project. Complete the final report using the template below, assuming the things missing from the project plan in the question above have been included.

Guidance:

- a. Access and carefully review the project documentation you were provided with along with the case study scenario and populate all the fields with the required information.
- b. Provide a date that is later than the last date in the Project Gantt Chart version 4.
- c. Assume that this report will be submitted to Terrence Mackay, Stephen Lyons, Kate Chan, and Kim Nguyen.
- d. Provide a brief summary of the project in terms of the four project constraints (Scope, Cost, Time, and Quality).
- e. Provide a detailed summary of the project covering the functions of project management listed below. Further guidance is provided for you within the template.

Mapping:

BSBPMG521 PC5.4, PE3

BSBPMG16 PC3.2, PC3.3, PE4

Marking guide

Student must write the final report for the project using the template. Specifically, student must:

- a. Access and carefully review the project documentation you were provided with along with the case study scenario and populate all the fields with the required information.
- b. Provide a date that is later than the last date in the Project Gantt Chart version 4.
- c. Assume that this report will be submitted to Terrence Mackay, Stephen Lyons, Kate Chan, and Kim Nguyen.
- d. Provide a brief summary of the project in terms of the four project constraints (Scope, Cost, Time, and Quality).
- e. Provide a detailed summary of the project covering the functions of project management listed below. Further guidance is provided for you within the template.

Student's responses will widely vary; however, they must include the key ideas of the benchmark answers provided within the template below. Student may also give other responses, provided that they align with the case study scenarios of the Workbooks 1 – 5 and the project documentation.

Project Name:	<i>Cascade Peak Chalets Landscaping Project</i>		
Prepared by:	<i>Student's Name (Demonstrates this document is the student's own work)</i>		
Date:	<i>Date must be after the last date on the project Gantt chart</i>		
Project Summary			
Scope (What was included and excluded)			
Inclusions:			
<i>Clearing of vegetation and laying of temporary access roads for building the chalets.</i> <i>Maintenance of the area during construction of the chalets and digging for all utilities.</i> <i>Landscaping around chalets including replanting displaced plants, construction of streams amongst chalets, and construction of parking and access ways around resort.</i>			
Exclusions			
<i>Construction of chalets.</i> <i>Installation of utilities.</i> <i>Marketing of chalets.</i>			
Cost (Budget vs. actual)			
<i>Budgeted: \$414,892</i> <i>Actual: \$514,892</i>			
Time (Estimate vs. Actual)			
<i>Planned completion of project: Monday 11 March 20YY (where 20YY refers to the succeeding year of the current year)</i> <i>Actual duration of project: 12 April 20YY. (where 20YY refers to the succeeding year of the current year)</i> <i>Student may break this up by project phase, but this isn't necessary for this assessment.</i>			
Project Report Submitted to:			
Name:	<i>Terrence Mackay</i>	Title:	<i>General Manager, Cascade Peak Hotel</i>
Date:			
Name:	<i>Stephen Lyons</i>	Title:	<i>General Manager, Cascade Peak Hotel</i>
Date:			
Name:	<i>Kate Chan</i>	Title:	<i>Project Manager, Timber Home Construction</i>
Date:			
Name:	<i>Kim Nguyen</i>	Title:	<i>Director, Awesome Landscapes</i>
Date:			

Analysis of Project

Guidance:

- a. *Process Review* - Describe all of the processes used during the planning, implementation and closure stages.
- b. *Lessons Learnt* - Describe what went right and or what went wrong and how effective were the management and the processes you used. If necessary, state how you overcame any problems.
- c. *Recommendations* – Make recommendations as a result of the lessons learned.

Note to assessor: The answers below are indicative of the student's responses which may vary. Every section should be answered from the information in the project plan.

Scope

Process Review

Student's answer must include:

- *Increase in scope just before the start of the project to erect three additional retaining walls.*
- *Additional scope in phase 2 to repair storm damage erosion when project was abandoned.*
- *Additional plants needed to be purchased in phase 3 due to plants dying when project was abandoned.*

Lessons Learnt

- *Site should have had someone there to maintain the plants and watch for erosion during transition between owners.*
- *More time needed to notify delivery personnel.*

Recommendations

- *Contingency should be built into future project plans to maintain the site even if major issues such as change in project ownership occur.*

Time

Process Review

- *Project delayed by about a month due to change in ownership.*
- *More time was allocated prior to the start of the project to allow more notice to delivery drivers to get materials and equipment onto the site in time.*
- *Otherwise all activities were completed to schedule.*

Lessons Learnt

- *More time needed to notify delivery personnel.*

Recommendations

- *At least two weeks' notice is required for remote site deliveries.*

Cost

Process Review • <i>Each change request blew out the cost.</i> • <i>Initial cost of project was \$444,253.</i> • <i>Final cost of project was \$514,892.</i> • <i>Additional \$100,000 was provided in the project budget as compensation for the abandonment of the project during the change of ownership.</i>
Lessons Learnt • <i>Huge shortfall in cash flow at start of project due to large expenses during the first two weeks and due to the payment structure by Massive.</i>
Recommendations • <i>Payment schedule should be more carefully considered with respect to the project cash flow in future projects.</i>
Quality
Process Review • <i>Quality audits were not reported in the project plan, so difficult to report on them.</i> • <i>Assume quality was fine with all tasks meeting deadlines.</i>
Lessons Learnt • <i>Audits not appearing in the final version of the project plan means valuable information and lessons learnt are lost.</i>
Recommendations • <i>Reporting quality audits in the project plan should be done to assist with the planning of future projects.</i>
Human Resources
Process Review • <i>Two landscapers left the project during the one month change of ownership. Two new landscapers were hired.</i>
Lessons Learnt • <i>Quickly assign other project or maintenance work to landscapers if the project stops.</i>
Recommendations • <i>Ensure there are backup projects or maintenance work available should the project stop. That will help with staff retention.</i>

Communications
Process Review <i>Progress reports were not included in the project plan, so these could not be evaluated. That makes the final report difficult to produce.</i> <i>There is no evidence that status reports were produced in this project.</i>
Lessons Learnt <i>All major communications documentation must be included in the project plan documentation.</i>
Recommendations <i>Include a copy of all project reports in updates of the project plan.</i>
Procurement
Process Review <i>Change in excavation contractor during project at request of new sponsor.</i>
Lessons Learnt <i>New contractor worked out well despite rushed tendering process.</i>
Recommendations <i>Have a backup plan should a contractor leave the project.</i>
Risk
Process Review <i>Risks around the project sponsor changing were not considered.</i>
Lessons Learnt <i>Changes in stakeholders and staff were not considered in the risk management plan, hence the need to completely develop the recruitment information from scratch.</i>
Recommendations <i>Include changes in all stakeholders as part of future risk management plans, and have a plan for each to quickly replace/manage them if needed.</i>
Project Integration
Process Review <i>Fortunately the change in ownership did not have any impact on the project integration which could have very easily changed.</i>

Lessons Learnt

- *The well-constructed project plan with its strong procedures meant the focus could be on delivering the project rather than fix up the processes when the ownership changed.*

Recommendations

- *Project reports should be put into the project plan to give a better idea of the history of the project.*

4. Sam has approved the report in the above question to be distributed. He has also updated the project plan following your advice. Now he is ready for the project closure meeting. He has assigned you the task of organising this meeting.

Answer the questions that follow.

Mapping:

BSBPMG521 PC5.2 (k)

BSBPMG516 PC2.1 (k)

Marking guide

Student must answer all of the following questions. Wording may vary, however, responses must be the same in thought and meaning with the benchmark answers provided:

- a. Who will attend this meeting?

Guidance: List the attendees by name, job title, and organisation).

Student must list all of the following, in any order. Names, job title, and organisation must be included:

- *Terrence Mackay (General manager Cascade Peak Hotel)*
- *Stephen Lyons (Planning Manager, Cascade Peak Shire Council)*
- *Kate Chan (Project Manager, Timber Home Construction Ltd)*
- *Kim Nguyen (Director, Awesome Landscapes Pty Ltd)*
- *Sam Ng (Project Manager, Awesome Landscapes Pty Ltd)*

- b. What information will each person need before the meeting?

	• <i>Location, date and time of the meeting.</i> • <i>Anything they will need to bring.</i> • <i>Drafts of the documents they will be signing off on in order to give them the time to raise any issues.</i>
c.	Which documents (and which version number of each document) will need to be printed off for the meeting?
	Student must specify the document, and the version number: • <i>Updated final version of the project charter.</i> • <i>Updated final version of the project plan.</i> • <i>Version 1 of the final report.</i> • <i>Project signoff (version number not needed, but can be version 1)</i>
d.	Which of these documents will require signatures?
	Student may answer with either “all documents”, or will list them as below: • <i>Project charter.</i> • <i>Project plan.</i> • <i>Final report.</i> • <i>Project signoff.</i>
e.	Who will need to sign off on these documents?
	<i>The steering committee members required to sign off on project documentation.</i>
f.	Do you believe the project objectives aligned with the objectives of Awesome Landscapes throughout the entire project life cycle? Explain your answer.
	<i>Yes. The scope of the project remained within Awesome Landscape’s core business activities.</i>
g.	What needs to be done after the meeting to complete the closure of the project?
	• <i>The project manager needs to ensure all documentation has all the required signatures.</i> • <i>The final financial audit needs to be filed.</i> • <i>The project documentation needs to be archived.</i>

WORKBOOK CHECKLIST

When you have completed this workbook, please ensure you have completed all parts of it:

☐ **Case Study**

IMPORTANT REMINDER

Students must achieve a satisfactory result to ALL assessment tasks to be awarded COMPETENT for the unit relevant to this subject.

To award the student competent in the units relevant to this subject, the student must successfully complete all the requirements listed above according to the prescribed benchmarks.

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