

BSBPMG515 MANAGE PROJECT HUMAN RESOURCES

PRACTICAL ASSESSMENT INSTRUCTIONS

- The following practical assessment will require the participant to complete work related activities.
- Observations will be conducted of the participant's work to determine whether they display sufficient practical skills and knowledge.
- Please fill in the details below, providing your name, signature and date of assessment.
 - Your signature acknowledges that the assessor provided clear instructions and the participant understood what was required to complete this assessment.
- The assessor may substitute a Practical Task with another task of equal value.
 - Alternate tasks must be fully documented by the assessor.

Participant name Lauren Symonds

Participant signature 

Assessor name Grace Martin

Assessor signature 

Date Click here to enter a date. 11/6/20

Number of tasks	Number of tasks completed	Satisfactory?	
		Yes	No
1		☒	☐

BSBPMG515

MANAGE PROJECT HUMAN RESOURCES

Practical Task 1	
Description of task: A suitable observer is to verify the participant's ability to manage human resources related to projects – including planning for human resources, implementing personnel training and development, and managing the project team.	
These tasks may be simulated or real. The participant is to gather evidence of how they have completed each component of the Practical Task, which is to be submitted with this Practical Assessment sheet. The observer is to provide detailed comments on the tasks completed by the participant. The assessor is to verify the observer's comments in the Assessor Comments section, and provide the Practical Assessment outcome on the front cover of this document.	
Resources required: Project documentation, Personnel documentation.	
Assessment of task	
Name of participant:	Lauren Symonds
Name of observer:	Grace Martin
Role of observer (Confirm suitability to sign)	Manager
Email address of observer	grace@rhmbi.com.au
Signature of observer:	
Date:	Click here to enter a date. 11/6/20
When completing the task, did the participant:	Tick if satisfactorily completed. Provide comments if left unticked.
1 Plan human resources relevant to projects	
1.1A. Determine resource requirements for individual tasks to establish required project personnel levels and competencies.	☒
1.1B. Establish project organisation and structure to align individual and group competencies with project tasks.	☒
1.1C. Allocate personnel to the project to meet planned work outputs throughout project timeline.	☒
1.1D. Apply human resources management (HRM) methods, techniques and tools to support engagement and performance of personnel.	☒
2 Implement project personnel training and development	
1.2A. Negotiate, define and communicate clear project role descriptions.	☒
1.2B. Identify, plan and implement ongoing development and training of project team members to support personnel and project performance.	☒
1.2C. Measure individuals' performance against agreed criteria and initiate actions to overcome shortfalls in performance.	☒
3 Lead project team	
1.3A. Implement processes and take action to improve individual performance and overall project effectiveness.	☒

1.3B.	Monitor and report, for remedial action, internal and external influences on individual and project team performance and morale.	☒
1.3C.	Implement procedures for interpersonal communication, counselling, and conflict resolution to maintain a positive work environment.	☒
1.3D.	Identify and manage inter-project and intra-project resource conflict to minimise impact on achievement of project objectives.	☒
4 Finalise human resource activities related to projects		
1.4A.	Disband project team according to organisational policies and procedures.	☒
1.4B.	Identify and document human resource issues and recommended improvements.	☒
The participant's performance was: ☒ Satisfactory ☐ Not Satisfactory		

OBSERVER COMMENTS

Satisfactory detail provided.



Resource Requirements Worksheet

Project: Ennis #2654 - Supply & install 4 steel structures

Work Breakdown Structure Element	Type of Resource Required:	Quantity	Involve Staff Acquisition	Involve Procurement?
Stage 1				
1.1 Acquire Engineering	Project Administrator	0.5	No	No
	ConX Software	1	No	No
1.2 Draw up site plan & Location of utilities	Estimator	1	No	No
	Project Administrator	0.5	No	No
1.3 Submit Council Application for council build authorisation	Project Administrator	1	No	No
Stage 2				
2.1 Order Kit Materials	Project Administrator	0.5	No	No
	Construction Manager	0.5	No	No
2.2 Draw up Concrete slab plan in accordance with Engineering	Construction Manager	0.5	No	No
	Project Administrator	0.5	No	No
Stage 3				
3.1 Earthworks	Concrete Contractor	3	No	Yes (Adamson Concreting)
3.2 Concrete Slab Pour	Concrete Contractor	2	No	Yes (Adamson Concreting)
3.3 Installation of kit materials for 4 steel structures	Site Supervisor	0.5		
15. Deliver kit materials	Construction Manager	1	No	No
	Lysaght Delivery	0.5	No	No
16. Structure preparation	Site Supervisor	1	No	No
	Installers	4	No	No
17. Construction of Structure 3	Site Supervisor	1	No	No
	Installers	2	No	No
18. Construction of Structure 4	Site Supervisor	1	No	No
	Installers	2	No	No
19. Construction of Structure 2	Site Supervisor	1	No	No
	Installers	2	No	No
20. Construction of Structure 1	Site Supervisor	1	No	No
	Installers	2	No	No



Detailed Resource Allocation

Job#: 2654

Client: Ennis

Task #	Task Description	Resource Allocation			# People	Skills
		Who	Role			
Stage 1						
1	1.1 Acquire Engineering	Lauren Symonds	Project Adminsitration		1	Cert 3 Administration, ConX software training
2	1.2 Draw up Site Plan & Location of utilities	David Buckley	Estimator		1	
		Lauren Symonds	Project Administration		1	Cert 3 Administration
3	1.3 Submit Council Application for council buil authorisation	Lauren Symonds	Project Adminsitration		1	Cert 3 Administration
Stage 2						
4	2.1 Order Kit Materials					
5	Prepare paperwork for ordering	Darren Martin	Construction Manager		1	Cert 3 Administration, ConX software Training
		Lauren Symonds	Project Adminsitration		1	ConX Software Training, basic administration training
6	Send Purchase Orders to Suppliers	Darren Martin	Construction Manager		1	Cert 3 Administration
7	Review order confirmations	Lauren Symonds	Project Adminsitration			
8	Coordinate consolidated delivery with stakeholders	Lauren Symonds	Project Adminsitration		1	Project Management
	2.2 Draw up concrete slab plan in accordance with Engineering	Darren Martin	Construction Manager		1	Engineering knowledge
10	Submit Concrete slab plan to subcontracted Concreter	Lauren Symonds	Project Adminsitration		1	Project Management
11	Coordinate Earthworks & Concrete with stakeholders	Lauren Symonds	Project Adminsitration		1	Project Management

Stage 3

12	3.1 Earthworks	Colin Adamson (Adamson Concreting	Concreter	1	Bobcat operation, Landscape construction, supervision
13	3.2 Concrete Slab Pour	Colin Adamson (Adamson Concreting	Concreter	1	Concreting formwork

3.3 Installation of kit materials for 4**14 steel structures**

15	Deliver kit Materials	Darren Martin	Construction Manager	1	Project Management
16	Structure Preparation	Darren Martin Paul Martin Curtis Martin James Johnston	Construction Manager Site Supervisor Installer Installer	0.5 1 1 1	Construction Supervision Site Supervisor Steel Structure construction Steel Structure construction
17	Construction of Structure 3	Paul Martin Curtis Martin	Site Supervisor Installer	1 1	Site supervision / installer Steel Structure Construction
18	Construction of Structure 4	James Johnston Curtis Martin	Installer Installer	1 1	Steel Structure Construction Steel Structure Construction
19	Construction of Structure 2	Paul Martin Curtis Martin	Site Supervisor Installer	1 1	Site supervision / installer Steel Structure Construction
20	Construction of Structure 1	James Johnston Curtis Martin	Installer Installer	1 1	Steel Structure Construction Steel Structure Construction

Stage 4

21	4.3 Project Management	Lauren Symonds Arlene Parsons	Project Adminsitration Administration	1 1	Project Management Accounts
22	4.3 Project Closure	Lauren Symonds Arlene Parsons	Project Adminsitration Administration	1 1	Project Management Accounts

► Employee Review Statement

NAME: Arlene Parsons

POSITION: Administration

SUPERVISOR: Grace Martin

WORK AREA: Gleneagle

REVIEW YEAR:

2020

Interim review(s)?

1-6-2020

End review date:

31/08/2020

POSITION DESCRIPTION:

☒ Yes PD (DS) is current

☐ No PD (DS) requires review / amendment

INCREMENTAL PROGRESSION:

X Not applicable

☒ Next increment due on 31-8-2020

REVIEW OF WHS RESPONSIBILITIES AND TRAINING

☒ WH&S training – has it been completed /is it up to date?

Comments:

OTHER REQUIRED TRAINING:

☐ Mandatory

☐ Other?

Comment:

First Aid Training, ongoing of any processes for work

LEAVE PLANS:

None

KEY RESPONSIBILITIES AND OUTCOMES:

1. Payroll
2. Data entry for purchases
3. Administration role
4. Budget

► Discussion and Feedback section

Discussion and feedback on achievements and / or factors hindering successful performance – guides for reflection/ discussion

ACHIEVEMENTS:

[Staff member] Major achievements in reporting period

[Manager/supervisor] Feedback on how these fit with objectives set for reporting period

- Learning MYOB and Service M8 - achievement
- Organising data for efficiency.

- Progress role to include design

BARRIERS / OBSTACLES:

- Do you see any barriers or obstacles to you achieving your performance or learning objectives? If so, what are these?
- Suggestions / solutions around barriers, work improvements...

- Con X
- CC Builder
- More comfort in answering the phone - phone etiquette
- Office allrounder

LEARNINGS:

Which areas of your work give you most satisfaction? What has been a key learning?

- Completing tasks
- Service M8 full potential
MYOB

TWO WAY FEEDBACK:

What could you or your supervisor/manager do differently that could further facilitate you achieving your objectives? Are there any other work related issues you or your supervisor would like to raise?

Happy to be at work

OTHER MATTERS:

For example: flexible work arrangements;

Happy with current work hours / arrangement.

► Individual Development Plan section

Required training:

Desired outcomes – for self and for work area	Details	Timeline:	Confirmation that completed end of review cycle
☐ Workplace Health and Safety? ☐ Mandatory supervisor training? ☐ Other?	ongoing	Review at next employee review	

Career Development:

Objective (s) and action(s) required <i>These should relate to objectives in the individual performance plan.</i>	Timeline: <i>This will depend on type of activity priority/importance of undertaking it</i>	Desired outcomes – for self and for work area/ cost centre <i>Eg having undertaken the development activity, what task will be able to be successfully done / how will the work area benefit</i>	Review of benefit: <i>Feedback at end of review cycle</i>
To be reviewed			

► Record of Discussion and Action section

MATTER	RECORD OF DISCUSSION / FOLLOW UP ACTION
Overall comments about regarding outgoing review year (re discussion/feedback section)	Happy with role and feel supported
Overall comments on performance objectives for incoming review year (eg priorities)	- Feel more comfortable answering phones. - More knowledge of Admin processes. - In 12 months time have less questions for processes.
Anything else?	

► Final Checklist and signatures section

Training/development for the next 6 months has been agreed & Individual Performance Plan completed?	☒		comment as appropriate
Priorities for the next 6 months have been agreed & Individual Performance Plan completed?	☒		
A date has been set for the next review (particularly for reviews occurring sooner than 12 months)?	☒		
Other action(s) to be taken (eg re PD, incremental progression, linked position)	☒		
Leave plans for year ahead	☒		

 Staff member's signature	 Manager's signature
1-6-2020 Date	1-6-2020 Date

PERFORMANCE IMPROVEMENT PLAN

Details	
Employee name	<i>Arlene Parsons</i>
Employee position and level	Administration Level 3
Manager name	<i>Lauren Symonds</i>
Manager position	<i>Project Administration</i>
Date of plan	<i>01/06/2020</i>
Period of plan	<i>Start 01/06/2020 to 31/08/2020</i>
Interim review date	<i>31/08/2020</i>
Final review date	<i>31/08/2020</i>
Performance improvement objective: <i>To become more comfortable speaking on the phone to clients. Improved knowledge of general administration processes and procedures.</i>	
Required outcomes	• To improve in confidence when speaking on the phone to clients, in a clear and friendly manner. • For general administration knowledge, Arlene needs to familiarize herself with the administration Standard Operating Procedures (S.O.P), • Process and accurately complete any administration documents quickly and efficiently. • Complete purchase order paperwork accurately

Details	
Strategies	- Operate the phones during work hours, answering, transferring calls and taking messages as required. - Read all S.O.P - To complete all administration forms as required paperwork is needed i.e. Contract, Scope of Works, Contract Variations, Customer Letters etc. - Use ConX and CCBuilder to gain understanding of the software - If you have any questions (eg. You're not sure how to complete a task, or if you're asked to complete a different task), you must immediately raise this with your manager.
Support	- Manager will provide you with training for ConX and CCBuilder software - Manager will meet with you every 4 weeks to provide feedback on your progress against the required outcomes. - Guidance is provided through the S.O.P - Staff team members with training on software or procedures to give guidance
Responsibilities	<i>Employee to meet the following responsibilities:</i> - To meet the required outcomes by the final review date - To participate in software training provided for ConX and CCBuilder software - Answer telephone and provide excellent customer service <i>Manager to meet the following responsibilities:</i> • to provide you with on-the-job support. • to provide you with refresher training on the ConX and CCBuilder software. • to conduct monthly feedback meetings.
Consequences	If you fail to meet the required outcomes by the review date, without reasonable excuse, you will be given a final written warning.

Details

Performance improvement objective: To become more comfortable speaking on the phone to clients. Improved knowledge of general administration processes and procedures.

Required outcomes	Competency on answering phones and general administration duties
Strategies	Operate phones, read S.O.P, software training, complete admin documents and ask questions
Supports	Software training, feedback from manager, guidance from trained colleagues
Responsibilities	Employee to meet required outcomes & participate in training. Manager to provide ongoing support, software training & provide regular feedback.
Consequences	Final written warning

Manager signature:



Print name:

Lauren Symonds

Date:

1st June 2020

Employee signature:



Print name:

ARLENE PARSONS

Date:

1st JUNE 2020

Underperformance meeting plan - template

Steps for developing an underperformance meeting plan

For more information on managing underperformance, see online learning courses at www.fairwork.gov.au/learning. For information about minimum employment rights and entitlements you can also call the Fair Work Infoline on 13 13 94 or visit www.fairwork.gov.au.

Step 1: Before the meeting

Before the underperformance meeting, you can use the template to record the details of the meeting.

- When and where you will meet with your employee
- Who will attend the meeting.

Attendees will include you and the employee, any witness / note-taker that you ask to attend the meeting and any support person (eg. a co-worker, family member, friend or union representative) that the employee chooses to bring to the meeting.

Also use the plan to prepare a summary of:

- Why you are meeting with the employee – what the underperformance issue is and why it's an issue. Use specific examples and focus on facts
- What steps that you've taken in the past to resolve the issue (eg. feedback and warnings) as well as any support that you've provided (eg. training)
- How you would like to move forward with the employee at this point in time, including any further support or assistance that you will provide.

Use dot-points so you have the information you need clearly set out in front of you. Make sure you take any relevant paperwork with you (e.g. the employee's performance agreement, job description and any performance improvement plan) and any documents that demonstrate the underperformance (eg. work examples, customer complaints or performance statistics).

Step 2: During the meeting

During the meeting, use your summary to guide what you say to your employee, and to make sure you cover everything you need to.

Don't read from the summary like a script, though. You might think of other things you need to cover, and you need to give the employee a chance to contribute.

Make sure you invite the employee to respond to what you've said and give them the opportunity to explain their performance. Ask them what they think can be done to improve their performance. Keep an open mind, actively listen, and ask open questions when you want to find out more. What the employee says may influence how you decide to move forward with the employee.

Step 3: After the meeting

Immediately after the meeting, make thorough notes of what was discussed in the meeting, including anything that you covered that wasn't in your summary, as well as anything the employee said.

UNDERPERFORMANCE MEETING PLAN

Details	
Date:	02/06/2020
Time:	9.30 am
Location:	RHM Building Innovations office 117 Mt Lindesay Highway, Gleneagle
Attendees:	<i>RHM Team: Lauren Symonds – Project Administration, Grace Martin - Director, David Buckley - Estimator Subcontractor: Colin Adamson, Adamson Concreting Pty Ltd</i>
Reason for the meeting	
Scope of concrete requirements not being documented by Estimator at beginning stage of quotation. This has led to insufficient communication between the client's expectations vs the project end result. The concrete works are quoted by the sub-contractor from discussion on site but no documentation to remember details. This has left out crucial items such as earthworks not being completed to clients expectations and misunderstanding. Quotation from concreter states 'ramp to carport', and client has interpreted this as a concrete ramp. Subcontractor and Estimator did not clarify that it was only road base.	
Background	
• This issue was raised after the work has been completed by concreter • No clear documentation for the specific earthworks by either Concreter and Estimator • Although the earthworks is stated in the Scope Of Works signed by client, the ramp was only assumed to be concrete by client and was not questioned.	

Details	
Next steps	
Performance Improvement plan to be put in place: Estimator to accurately document the clients expectations of the project, and to be specific about works that are to be performed for the project. Communicate clearly the expectations with the client on quotation to ensure they understand everything that will happen for the project. Estimator and Concreter to document specific earthworks and or concreting to ensure thorough coverage of the project goal. This is then to be documented in the Scope of Works and then provided to the client to review.	
Task list	Due date
<i>Provide a copy of this underperformance meeting plan to all attendees of this meeting</i>	02/06/2020
<i>Prepare performance improvement plan; provide copy to Estimator and ask him to sign</i>	03/06/2020
<i>Schedule meeting with Project Administrator to review performance</i>	05/06/2020