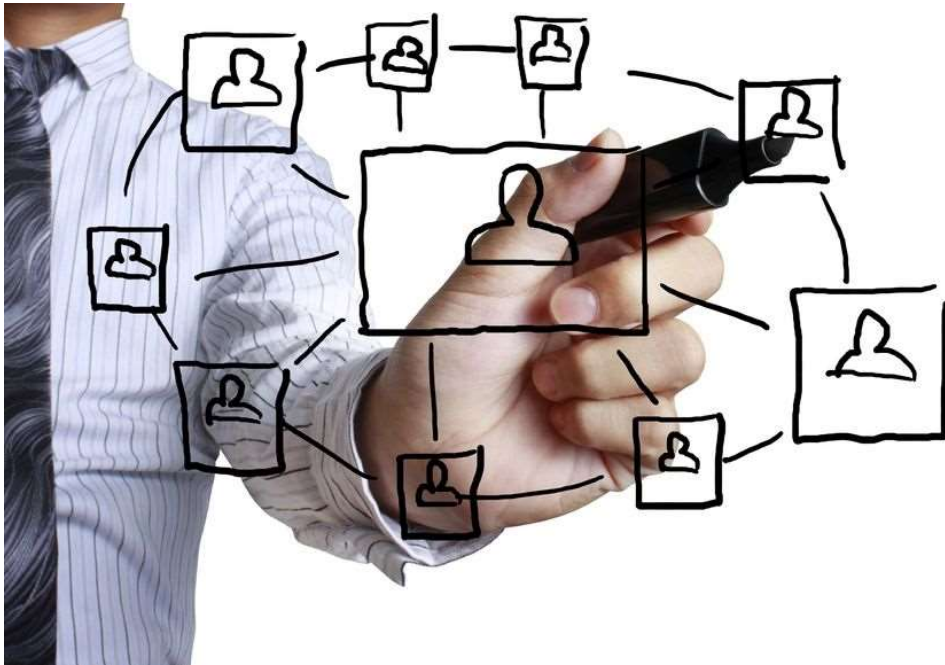




**SUCCESSION
TRAINING**

BSB51415 Diploma of Project Management



Integration Management

Version 1.01 Produced 18 October 2018

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Version control & document history

Date	Summary of modifications made	Version
5 May 2016	Version 1.0 produced following assessment validation.	1.0
18 October 2018	Version 1.01 Change to Practical Assessment	1.01

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ASSESSMENT WORKBOOK COVERSHEET

WORKBOOK:	Workbook 5
TITLE:	Integration Management
FIRST AND SURNAME:	Daniel Harrison
PHONE:	0409 005 459
EMAIL:	dharrison@hicon.com.au

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 : Daniel Harrison

Signature:



Date:

28/09/2020

CASE STUDY

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

- | |
|--|
| <ol style="list-style-type: none">a. Project completion report has not been completed.b. Changes due to change request 3 are not shown. It acknowledges that JP Digging was replaced however it does not specify who replaced them. This is under resources and stakeholders. Project cashflow has not been updated. Only allows for CR1.c. Lessons learnt session has not been held and documented.d. Project archiving checklist has 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.

Lessons Learnt Documentation Template 1

Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Daniel Harrison
Date	28/09/2016
Project Manager	Sam Ng
Lessons Learnt Number	1
Lesson Learned Proposed Name:	Delays in supply of the glasshouse and landscaping supplies.
Project Team Role:	Project Management Consultant Advisor
Process Group*	
☐ Initiating ☐ Planning ☒ Executing ☐ Controlling ☐ Closing	
Specific project management process being used:	
Supply of materials	
Specific practice, tool or technique being used:	
Procurement	
What action was undertaken?	Materials had to be ordered well in advance of requirement
What was the result?	Materials were not always delivered in a timely manner
What might have been a more preferred result?	All materials being delivered before being required on site
What might have created the more preferred result?	Earlier procurement, ordering and following up of orders
What is the specific lesson learnt?	

Procurement of materials is a vital part of succesful project delivery							
How could one identify a similar situation in the future?							
Early identification of materials that have longer lead times							
What behaviour is recommended for the future?							
Early initial planning in procurement and ordering							
Where and how can this knowledge be used later in this current project?							
Project is complete							
Who should be informed about this Lesson Learnt:							
☐	Executive(s)	☒	Project Manager(s)	☒	Project team (s)	☐	All staff
☐	Others						
How should this Lesson Learnt be disseminated?							
☒	E-mail	☒	Intranet/Web site	☒	Tip Sheet/FAQ	☐	Library
☐	Others						

Lessons Learnt Documentation Template 2									
Project Name	Cascade Peak Chalets Landscaping Project								
Prepared by	Daniel Harrison								
Date	28/09/2016								
Project Manager	Sam Ng								
Lessons Learnt Number	2								
Lesson Learned Proposed Name:	Hiring and Training Mid Project								
Project Team Role:	Project Management Consultant Advisor								
Process Group*									
☐	Initiating	☐	Planning	☒	Executing	☐	Controlling	☐	Closing
Specific project management process being used:									
Hiring and training of project staff									
Specific practice, tool or technique being used:									

Human Resources & Procurement	
What action was undertaken?	Staff changes mid project meant additional staff needed to be hired and trained to complete the project
What was the result?	Additional cost and time was spent on hiring and training of additional project staff
What might have been a more preferred result?	Retention of staff through entire project
What might have created the more preferred result?	More attractive staff retention packages. Local staff employment and retaining program.
What is the specific lesson learnt?	
Upfront commitment to staff may result in reducing additional cost and time; and improve production	
How could one identify a similar situation in the future?	
Prior to projects commencing offer retention bonuses and job security through retainers	
What behaviour is recommended for the future?	
Greater emphasis on staff retention with human resource management	
Where and how can this knowledge be used later in this current project?	
Project is complete	
Who should be informed about this Lesson Learnt:	
☒ Executive(s)	☒ Project Manager(s)
☒ Project team (s)	☐ All staff
☐ Others	
How should this Lesson Learnt be disseminated?	
☒ E-mail	☒ Intranet/Web site
☒ Tip Sheet/FAQ	☐ Library
☐ Others	

Lessons Learnt Documentation Template 3	
Project Name	Cascade Peak Chalets Landscaping Project
Prepared by	Daniel Harrison
Date	28/09/2016
Project Manager	Sam Ng
Lessons Learnt Number	3

Lesson Learned Proposed Name:	Additional Cost and Rework During Project Suspension Periods			
Project Team Role:	Project Management Consultant Advisor			
Process Group*				
☒ Initiating	☒ Planning	☐ Executing	☐ Controlling	☐ Closing
Specific project management process being used:				
Estimation and planning				
Specific practice, tool or technique being used:				
Cost estimation				
What action was undertaken?	The project was suspended for a period while the project sponsor changed			
What was the result?	Site damage expenses were incurred along with plants requiring replacement from lack of maintenance. This resulted in additional expense.			
What might have been a more preferred result?	No additional costs incurred from works suspension			
What might have created the more preferred result?	Risk allowance in budget for re-work and re-planting. Programming of works to avoid maintenance.			
What is the specific lesson learnt?				
Allowance and planning needs to be considered for re-work and potential suspension periods				
How could one identify a similar situation in the future?				
Go through which items require maintenance during construction phase and program their completion as late as possible.				
What behaviour is recommended for the future?				
Include risk allowance in items that may require re-work. Program items requiring maintenance as late as possible in program. Develop a maintenance program that could be adopted if works are suspended.				
Where and how can this knowledge be used later in this current project?				
Project is complete				
Who should be informed about this Lesson Learnt:				
☐ Executive(s)	☒ Project Manager(s)	☒ Project team (s)	☐ All staff	
☐ Others				
How should this Lesson Learnt be disseminated?				
☒ E-mail	☒ Intranet/Web site	☒ Tip Sheet/FAQ	☐ Library	

☐	Others	

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.

Project Name:	Cascade Peak Chalets Landscaping Project
Prepared by:	Daniel Harrison
Date:	27/04/2017
Project Summary	
Scope (What was included and excluded)	

Inclusions:

Stage 1 - Pre-building

- Removal of vegetation in areas being cleared and replanting/maintaining the plants for replanting in stage 3.
 - o Supply and delivery of all vegetation removal equipment and tools.
 - o Supply and erection of covered building to store and grow native plants collected from areas being cleared.
 - o Irrigation, potting and chemicals for maintenance of plants.
 - o Separation and disposal of weeds from native plants.
 - o Ensuring the ongoing health of large plants and trees left in the ground.
- Access roads through the existing forest for builders to access each building site.
 - o Supply and delivery of all excavation equipment and vehicles.
 - o Removal of soil and storage in designated location on site for use for landscaping.
 - o Supply and laying of road gravel along temporary access roads.
 - o Building an unsealed car park at the front entrance.
 - o Supply and delivery of granite boulders and all other raw materials used for retaining walls.
 - o Construction of retaining walls.
 - o Insertion of soil into retaining wall areas from excavations.
 - o Compacting of soil behind retaining walls as required for foundation work.

Stage 2 – Building Support

- Monitoring the building site for erosion, subsidence or other environmental issues.
 - o Managing any erosion or subsidence in the land where chalets are being built.
 - o Maintaining the road access to the chalets.
 - o Monitoring trees and other vegetation not removed.
- Excavation for incoming utilities (electric cable, water supply, etc.).
 - o Digging channels as per plans and installer requirements.
 - o Filling in and compacting channels once utilities installed.
- Ensuring surface infrastructure for utilities remain clear and uncovered.
 - Excavation of sewerage and septic system.
 - o Excavation of holes for septic tanks.
 - o Excavation of channels for sewerage pipes.
 - o Filling in and compacting channels and holes once sewerage and septic system has been installed.
 - o Ensuring surface infrastructure for sewerage and septic systems remain clear and uncovered.
- Maintaining the plants removed in stage 1.
 - o Supply of all chemicals and equipment needed to maintain the plants.
 - o All maintenance of the green houses.
 - o Maintenance of all plants.
 - o Removing weeds and pests as required.
- Repair of slip damage.

Stage 3 – Planting and Landscaping

- Diversion of stream and creation of water channels through resort in between the chalets.
- o Construction of stream channels as per plan.
- o Supply and delivery of granite boulders for landscaping and ground stability around the stream channels.
- o Excavation of channels diverting water from main stream.
- o Construction of weir system used to divert water.
- o Construction of drainage system to return water to main stream do chalets.
- o Testing and troubleshooting.
- Conversion of most access roads into landscaped walking paths.
- o Expansion of car park along main road.
- o Removal of access road gravel and laying over car park.
- o Sealing of car park over gravel.
- o Restoration of soil around old access roads.
- o Construction of stone paved walking paths between chalets as per p
- o Compacting and ensuring no erosion or subsidence risk.
- Erection of signage around resort.
- o Erecting signs provided by marketing project.
- o Concreting and additional landscaping around signs.
- Detailed landscaping around chalets and paths.
- o Soil surface preparation.
- o Additional boulders placed in landscaping.
- o Removal of all weeds in resort.
- Planting of native plants removed in stage 1 plus additional native plants back into landscaped areas to blend in with forest.
- o Planting of all healthy native plants removed in stage 1.
- o Purchasing and delivery of additional native plants to fill the gaps.
- o Planting additional plants.

Exclusions

Stage 1 – Pre-building

- Removal of vegetation in areas being cleared and replanting/maintaining the plants for replanting in stage 3.
 - o Sourcing and maintenance of any additional native plants to be planted at the end of the project.
 - o Removal of trees (these will remain in the ground, and buildings will be erected around them).
 - o Planting of new trees.
- Access roads through the existing forest for builders to access each building site.
- o Sealing of roads or car park.
- o Maintenance of main road up the mountain to the resort property.
- o Construction of any foot paths.
- o Construction of any bridges, culverts.
- o Construction of any electrical services (e.g. street lighting, power access to chalet sites, etc.).
- Retaining walls to provide stability around the buildings.
- o Construction of foundations.
- o Planting around retaining walls.

Stage 2 – Building Support

- Monitoring the building site for erosion, subsidence or other environmental issues.
 - o Monitoring and maintaining partially and fully constructed buildings.
 - o Monitoring and maintaining the main road.
 - o Creation of additional retaining walls.
 - o Onsite security (this is provided by the chalet development project).
 - o Any building, decorating or furnishing of the chalets.
- Excavation for incoming utilities (electric cable, water supply, etc.).
- o Installation of utilities.
- o Installation of service points at either road or chalet end.
- o Provision or delivery of utility raw materials or installation equipment.
- o Testing of the utilities (this will be done by the building contractors when the cables and pipes have been laid, but before they are buried.
- o Weather damage.
- Excavation of sewerage and septic system.
- o Installation of pipes and tanks.
- o Construction of septic system buildings or other infrastructure.
- o Provision or delivery of pipes and tanks.
- Maintaining the plants removed in stage 1.
- o Purchase and maintenance of additional native plants to replace any that had perished.
- o Removal of additional plants or weeds from the building sites.

Stage 3 – Planting and Landscaping

- Diversion of stream and creation of water channels through resort in between the chalets.
 - o Nil
- Conversion of most access roads into landscaped walking paths.
 - o Construction of any roads within the resort.
 - o Construction of any hand rails (this will be done by builders in the chalet development project once we have finished developing the paths.
- Erection of signage around resort.
 - o Sign design or sign writing.
- Detailed landscaping around chalets and paths.
 - o Any pot plants to go around or inside chalets.
 - o Development of any ongoing maintenance plan.
- Planting of native plants removed in stage 1 plus additional native plants back into landscaped areas to blend in with forest.
 - o Purchase, delivery of planting of any exotic species.
 - o Development of any plant maintenance plan.

Cost (Budget vs. actual)

Final Budget = \$514,892 (excl. GST)

Actual Cost = \$650,000 (excl. GST)

Time (Estimate vs. Actual)

Planned Start = 3 August 2016

Actual Start = 27 July 2016

Planned Finish = 11 March 2017

Actual Finish = 12 April 2017

Project Report Submitted to:

Name: Terrence Mackay	Title: General Manager Cascade Peak Hotel Pty Ltd	Date: 27/04/2017
Name: Stephen Lyons	Title: Planning Manager - Cascade Peak Shire Council	Date: 27/04/2017
Name: Kate Chan	Title: Project Manager - Timber Home Construction Ltd	Date: 27/04/2017
Name: Kim Nguyen	Title: Director – Awesome Landscapes Pty Ltd	Date: 27/04/2017

Analysis of Project	
Guidance: <i>Process Review</i> - Describe all of the processes used during the planning, implementation and closure stages. <i>Lessons Learnt</i> - 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. <i>Recommendations</i> – Make recommendations as a result of the lessons learned.	
Scope	
Process Review	Scope was checked against that outlined in the project plan.
Lessons Learnt	Some minor changes to scope were required due to change of sponsor. These were reflected in the scope change report and delivered successfully.
Recommendations	Scope change reports to be completed and project plan to be updated accordingly as soon as possible.
Time	
Process Review	Time was compared against the project plan and gantt chart
Lessons Learnt	Scope changes and change in sponsor had significant affects to the project time.
Recommendations	Scope change report to be prepared as required and project plan and gantt chart to be updated accordingly.
Cost	
Process Review	Cost was compared against the project plan.
Lessons Learnt	Scope changes and change in sponsor had significant affects to the project cost.
Recommendations	Scope change report to be prepared as required and project plan to be updated accordingly. Project contingency is essential.
Quality	
Process Review	Quality was controlled through quality control and quality assurance. Quality audits were conducted as required.
Lessons Learnt	Quality of products and work to be checked for compromisation from scope changes.
Recommendations	Internal and subcontractor quality to be audited.
Human Resources	

Process Review Personnel and resources were reviewed as per the project plan
Lessons Learnt Personnel can change mid project and contingencies need to be in place to mitigate affects to the project
Recommendations Local resources, attractive packages and thorough recruiting process
Communications
Process Review Communications and reporting was following in accordance with the project plan
Lessons Learnt Clear communications with all project stakeholders and personnel is essential including project sponsors
Recommendations Regular meetings with project sponsors
Procurement
Process Review Procurement of contractors and suppliers to be as per the auditing requirements set out in the project plan
Lessons Learnt Ensure sufficient supply lead times have been allowed for. Buy local where possible/practical.
Recommendations Early ordering and supplier delivery schedule are essential
Risk
Process Review Risks are reviewed as per the project plan templates
Lessons Learnt Risks to be reviewed regularly. Risks during a project can change.
Recommendations Review risk ratings regularly
Project Integration
Process Review Project integration procedures and documentation as per the project plan
Lessons Learnt Project plan to be followed closely and updated as required.
Recommendations Project plans to be updated as soon/regularly as possible especially after scope changes.

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.

a. Who will attend this meeting? Guidance: List the attendees by name, job title, and organisation).
Terrence Mackay – General Manager – Cascade Peak Hotel Kim Nguyen – Director – Awesome Landscape Pty Ltd Sam Ng – Project Manager – Awesome Landscape Pty Ltd Stephen Lyons – Planning Manager – Cascade Peak Shire Council Kate Chan – Project Manager – Timber Home Construction Ltd
b. What information will each person need before the meeting?
Information/details/draft copy of the project report; and project charter and project plan
c. Which documents (and which version number of each document) will need to be printed off for the meeting?
Latest revision of the project charter and project plan. Final payment certificate.
d. Which of these documents will require signatures?
Project charter and project plan. Final payment certificate

e.	Who will need to sign off on these documents?
	Steering committee members
f.	Do you believe the project objectives aligned with the objectives of Awesome Landscapes throughout the entire project life cycle? Explain your answer.
	Yes based on the objectives of the project plan. Even though there were changes and challenges along the way all key objectives were delivered.
g.	What needs to be done after the meeting to complete the closure of the project?
	Project archive checklist needs to be completed including signing project plan, project charter and project sign off archived. Remaining archiving completed with archive checklist all filled in and filed with the files.

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.

End of Document