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| **Assessment Details** | | | | | |
| **Qualification Code/Title** | **BSB50215 - Diploma of Business** | | | | |
| **Assessment Type** | Assessment - | | **Time allowed** |  | |
| **Due Date** |  | **Location** | AHIC | **Term / Year** |  |

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| **Unit of Competency** | |
| **National Code/Title** | BSBPMG522 Undertake project work |

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| **Student Details** | | | |
| **Student Name** |  | **Student ID** |  |

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| **Student Declaration:** I declare that the work submitted is my own, and has not been copied or plagiarised from any person or source. | Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: \_\_\_\_\_/\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_ |

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| **Assessor Details** | | |
| **Assessor’s Name** |  | |
| **RESULTS (Please Circle)** | **SATISFACTORY** | **NOT SATISFACTORY** |

**Feedback to student:**

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| **Student Declaration:** I declare that I have been assessed in this unit, and I have been advised of my result. I am also aware of my appeal rights.  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: \_\_\_\_\_\_/\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_\_ | **Assessor Declaration:** I declare that I have conducted a fair, valid, reliable and flexible assessment with this student, and I have provided appropriate feedback.  Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date: \_\_\_\_\_\_/\_\_\_\_\_\_\_/\_\_\_\_\_\_\_\_\_\_\_ |

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| **Instructions to the Candidates**   * This assessment is to be completed in class supervised by assessor. * Should you not answer the questions correctly, you will be given feedback on the results and your gaps in knowledge. You will be given another opportunity to demonstrate your knowledge and skills to be deemed competent for this unit of competency. * If you are not sure about any aspect of this assessment, please ask for clarification from your assessor. * Please refer to the College re-submission and re-sit policy for more information. * If you have questions and other concerns that may affect your performance in the examination please inform the assessor immediately. |

# Task 01: Define Project and Develop Plan

**Assessment description**

Using the Max Realty workplace scenario information provided you will determine the scope of a project and develop a portfolio of draft planning documentation to discuss with your Operations General Manager (the assessor). You will then negotiate aspects of the project with your assigned project team. Finally, you will submit final planning documentation for approval.

**Procedure/Instructions**

1. Review the simulated business documentation, including policies and procedures, in the document ‘Max Lionel Realty.docx’. Review templates contained in the document ‘Project planning templates.docx’ for possible use or adaptation in completing project requirements.

2. Review the scenario information provided in Appendix 1.

3. Receive details from Operations General Manager (the assessor) of your project team, cost, skills, and suggested project deliverables and timeframes.

4. Determine project scope. Develop appropriate initiation and scope documents for discussion with Operations General Manager (the assessor).

5. Determine additional documentation required to determine project and develop deliverables.

6. Define project stakeholders. Determine how you will engage and manage stakeholders to achieve project objectives. Develop communication and stakeholder management plans for discussion.

Note: Consider scenario information and organisational structure to determine stakeholders and stakeholder interests.

7. Identify personal responsibilities and reporting requirements.

8. Determine relationship of project to other projects, systems, business operations, strategic aims of organisation, and external legislative requirements.

9. Determine resources and access to resources. Consult with Operations General Manager (the assessor) to clarify if necessary.

10. Determine project management tools, such as software (e.g. Microsoft Word, MS Excel, and MS Project) and templates, etc.

Note: You may use software tools or use or adapt the templates provided.

11. Using an appropriate project management tool, develop your project plan (version 1). Include:

a. work breakdown structure: stages of development or of task completion (Design, Develop, Implement, Evaluate); opportunities for (peer and stakeholder) review and feedback; coordination of roles and sharing of responsibility for deliverables; dependencies

b. timelines

c. roles and responsibilities for each team member

d. resourcing requirements.

12. Develop a risk management plan for your project (version 1) for discussion. Include consideration of WHS risk management. Identify, assess and suggest treatment of at least three additional risks, including financial risk. Record risks on a risk register and complete a risk assessment document for each risk.

Note: You may use software tools or use or adapt the templates provided.

13. Develop a budget (version 1) for the project.

Note: You may use software tools or use or adapt the template provided.

14. Meet with Operations General Manager (the assessor) to discuss:

a. project scope

b. additional documentation required to determine project and develop deliverables.

c. project stakeholders

d. personal responsibilities

e. relationship of project to other projects, systems, strategic aims of organisation

f. resources and access to resources

g. portfolio of documents:

i. project initiation and scope documents

ii. project plan (version 1)

iii. risk management plan (version 1)

iv. budget (version 1).

15. Ask for feedback from your Operations General Manager (the assessor) on your version 1 drafts and ensure understanding of any additional project issues or changes to project parameters.

16. Meet with your project team to:

a. negotiate roles and responsibilities

b. Agree on version 2 of documents for approval by Operations General Manager (the assessor):

i. project plan (version 2)

ii. risk management plan (version 2)

iii. budget (version 2).

c. Incorporate Operations General Manager (the assessor) feedback into planning project:

Note: The meeting will be observed by your assessor. Follow your communication plan or agree to a time and date.

When meeting with your team, be:

i. professional

ii. accommodating and conscious of varying skill levels, interests, backgrounds

iii. submit documentation as per specifications below.

**Assessor will provide further instructions in class room on completing assessment tasks which will clearly outline all requirements in more detail and simplistic way according to your understanding level. You may also request your trainer for additional information and may seek help with summarising of all instructions.**

## Submission Specifications

You must:

* meet with Operations General Manager to discuss project scope and portfolio of planning documents
* participate in project meeting/s with project team
* submit:
  + project initiation and scope documents, including: a project brief; a project scope; a stakeholder analysis; a communication plan; roles and responsibilities; project snapshot
  + a project plan (version 1 and version 2)
  + a risk management plan (risk register and risk assessment for each of four risks) (version 1 and version 2)
  + a budget (version 1 and version 2).

Your assessor will be looking for:

* communication and negotiation skills to work with team members and other stakeholders to maintain project schedules
* literacy skills to read, write and review a range of documentation
* planning and organising skills to develop project plans
* numeracy skills to analyse data and to compare timelines and implementation costs against budgets
* culturally appropriate communication skills to relate to people from diverse backgrounds and people with diverse abilities
* knowledge of relevant legislation from all levels of government that may affect aspects of business operations, such as:
  + anti-discrimination legislation
  + ethical principles
  + codes of practice
  + privacy laws
  + environmental issues
  + WHS
* knowledge of organisational structure and chains of authority and communication within the organisation
* knowledge of how the project relates to the organisation’s overall mission, goals, objectives and operations.

## Appendix – Scenario

### Max Lionel Realty

Max Lionel Realty (MLR), in order to build customer goodwill and satisfy its legal and ethical obligations, has decided to implement a program to:

* inform agents of legal and ethical obligations (particularly with respect to WHS and anti-discrimination legislation) and any standards or codes of conduct followed by the organisation
* promote high standards in professional conduct (see Real Estate Institute of Victoria (REIV) Code of Conduct and relevant legislation)
* inform clients, tenants and potential tenants of MLR’s commitments
* achieve employee and client buy-in for initiative.

You are an external consultant (from Ace Consultants) contracted to project manage activities to achieve the objectives above.

Quality standards for deliverables:

* clearly communicate legal obligations and REIV obligations
* contain as content or support company strategic directions
* no grammar or spelling errors
* professional but friendly language
* fair and flexible delivery for intended audience
* meet audience requirements and sensitive to information needs, cultural diversity.

Previous needs analysis for the project has uncovered characteristics and requirements of Residential and Commercial Agents and Clients:

| Agents | Clients | Tenants |
| --- | --- | --- |
| * under stress; time poor * highly trained and competent in selling and managing real estate * unaware of legal, ethical requirement. just want to please clients * even if aware, have no idea how to apply to daily client practice | * cynical: e.g. *‘why do I have to pay attention to MLR’s internal business? I just want them to manage my property.’* * time poor * not sure of MLR obligations and commitment to best-of-breed client service and ethical practice, REIV code of conduct | * sometimes feel discriminated against on basis of:   + lifestyle   + family status   + cultural background   + income, etc. |
| * unclear on overall strategic aims of MLR * culturally diverse. | * feel it’s the agent’s obligation to fill rental/lease properties according to client wishes: e.g. *‘I choose who lives in/leases my property’* * culturally diverse. | * residential agents have been rude or insensitive on occasion: e.g. *‘you wouldn’t treat your rich clients or investment partners this way’* * do not feel they are adequately consulted * residential/commercial agents/clients have let themselves in without consultation * inspections are sometimes unannounced. |

Project conditions are as follows:

* Six to eight team members (two to four candidates plus four virtual team members) who must be utilised and budgeted for. Operations General Manager (the assessor) will determine composition of project team.
* The structure of the work should include roles for project sponsor, technical experts, quality assurance of deliverables, project manager (yourself initially and, after provisional approval, as negotiated with your team), and roles and responsibilities for each team member to achieve the deliverables according to standards, etc.
* All reasonable resources (e.g. access to a room, computers, software and templates) will be provided. Paper and telecommunications costs, for example, to be covered by candidates. All resources must be costed and included in your budget.
* Budget: $15,000.
* Your Operations General Manager (the assessor) will suggest project deliverables, for example, presentations, information sessions, posters, promotional materials, etc. You may determine your own specific deliverables so long as they are agreed to with stakeholders, meet project objectives, and adhere to budgetary constraints.
* Project timeframe to be determined by Operations General Manager (the assessor as project sponsor).
* Project should include design, development, implementation and evaluation stages (with periodic quality review).
* Project status reports are due at 25%, 50% and 75% of allotted timeframe.
* Project must be coordinated with other organisational projects, operations, etc.