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**BSBFIN501**

**MANAGE BUDGETS AND FINANCIAL PLANS**

**ASSESSOR**

**MARKING   
GUIDE**

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| A close up of a logo  Description automatically generated | Introduction |

Welcome to the Assessor Marking Guide for *BSBFIN501 Manage budgets and financial plans*. This Marking Guide provides you with assessment tasks, checklists and marking guidance. It also provides advice on delivering the assessment for this unit.

This document is one of a suite of resources which has been developed by RTO Works to support you in delivering assessment for units of competency from the Business Services Training Package.

Please ensure that you read this guide in conjunction with the *Business Works Assessor User Guid****e.***

Supporting resources

A number of documents have been provided with this Marking Guide to support assessors and students.

*For the assessor*

* *Business Works Assessor User Guide*: The Assessor User Guide provides important information for assessors relating to the delivery of quality assessment.
* *Assessment Mapping*: A mapping guide is included as a separate document to show how each assessment task maps to the unit of competency. You will find the assessment mapping in the BSBFIN501 Mapping folder.
* *Supporting resources*: Supporting resources include templates and checklists which can be used when preparing for and marking assessment tasks. You will find the supporting resources in the BSBFIN501Assessor Resources folder. For this unit, the supporting assessor resources comprise:
  + *BSBFIN501 Simulation Pack* (if they need a case study)
  + *Project Portfolio Assessor* (Assessment Task 2).

*For the student*

* *Business Works Student User Guide*: The Student User Guide provides important information for students relating to completing training, work placements and assessment.
* *Student Assessment Tasks*: The Student Assessment Tasks include the tasks as well as guidance about how to complete each assessment. Submission information and relevant forms are also included. The Student Assessment Tasks for this unit can be found in the BSBFIN501Assessment folder.
* *Supporting resources*: Supporting resources include templates, journals, workbooks and portfolios which can be used by the student to support them in providing evidence of their competence. You will find supporting resources in the BSBFIN501 Student Resources folder. Please ensure that students receive these documents before they begin their assessment tasks.

For this unit, the supporting resources for students comprise:

* + *BSBFIN501 Simulation Pack*
  + *Project Portfolio Template* (Assessment Task 2).

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| A close up of a logo  Description automatically generated | Assessing this unit |

*BSBFIN501 Manage budgets and financial plans* describes the performance outcomes, skills and knowledge required to undertake financial management in an organisation or work area. It includes planning and implementing financial management approaches and supporting and evaluating effectiveness of financial management processes.

The unit applies to managers in a wide range of organisations and sectors who have responsibility for the effective use of financial resources within work teams. They are responsible for ensuring that financial resources are managed in line with the financial objectives of the team and organisation.

For students to be assessed as competent, they must successfully complete two assessment tasks:

* Assessment Task 1: Knowledge questions – Students must answer all questions correctly.
* Assessment Task 2: Project – Students must work through a range of activities and complete a project portfolio.

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| A close up of a logo  Description automatically generated | Assessment Task 1: Knowledge questions |

Information for assessors

Knowledge questions are designed to help the student demonstrate the knowledge which they have acquired during the unit. Ensure that you:

* review the advice to assessors regarding administering knowledge questions in the *Business Works Assessor User Guide*
* provide students with a due date for assessment
* provide submission guidelines to students
* follow your organisation’s policies and procedures
* refer to your organisation’s Training and Assessment Strategy
* provide written feedback to each student
* provide resubmission guidance to students (including a timeline) who do not complete the task satisfactorily
* complete the Assessment Task 1 Checklist which can be found at the end of this task.
* complete the Final Results Record which can be found at the end of this Assessment Marking Guide.

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| **i** | **Assessment delivery information**  Assessment delivery information which has been contextualised to your RTO’s student cohort can be found in Appendix A of the *Business Works Assessor User Guide*.­Use this information to advise students of:   * where this task should be completed * the maximum time allowed for completing this assessment task * whether or not this task is open-book.   *Note*: Students should complete and submit an assessment cover sheet with their work. A template is provided in Appendix C of the Assessor User Guide. |

Information for students

Knowledge questions are designed to help you demonstrate the knowledge which you have acquired during the learning phase of this unit. Ensure that you:

* review the advice to students regarding answering knowledge questions in the *Business Works Student User Guide*
* comply with the due date for assessment which your assessor will provide
* adhere with your RTO’s submission guidelines
* answer all questions completely and correctly
* submit work which is original and, where necessary, properly referenced
* submit a completed cover sheet with your work
* avoid sharing your answers with other students.

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| **i** | **Assessment information**  Information about how you should complete this assessment can be found in Appendix A of the *Business Works Student User Guide*.Refer to the appendix for information on:   * where this task should be completed * the maximum time allowed for completing this assessment task * whether or not this task is open-book.   *Note*: You must complete and submit an assessment cover sheet with your work. A template is provided in Appendix C of the Student User Guide. However, if your RTO has provided you with an assessment cover sheet, please ensure that you use that. |

Questions

Provide answers to all of the questions below:

1. Explain the basic principle of double entry bookkeeping.

The student must explain the basic principle of double entry bookkeeping. Their response may include but is not limited to:

The basic principle of double entry bookkeeping is that there are always two entries for every transaction. One entry is known as a credit entry and the other a debit entry. The entries are often displayed in ‘T’ accounts.

1. Complete the following table to describe the principles of cash and accrual accounting and an advantage and disadvantage of each method of accounting.

The student must complete the table to describe the principles of cash and accrual accounting and an advantage and disadvantage of each method of accounting. Their response may include but is not limited to:

| **Type of accounting method** | **Description** | **One advantage and one disadvantage of this method** |
| --- | --- | --- |
| Cash accounting | Cash accounting tracks the actual money coming in and out of a business. In cash accounting, if you get an invoice for something, the cost is not recorded in the businesses books until the invoice has been paid. Similarly, when you an invoice is sent to a customer, the sale is not recorded until the money is received. | Advantage:   * A simple system that keeps track of business cash flow * Generally suited to smaller businesses that mostly handle transactions in cash, for example a hairdresser's or a grocery store * Gives a picture of how much money there is in the till and in bank accounts.   Disadvantage   * It does not capture money that is owed, or money owed to others. * The simplicity of the system is also a disadvantage as there is less control over transaction posting. |
| Accrual accounting | Accrual accounting is when you record expenses and sales when they take place instead of when cash changes hands. | Advantage:   * Better suited to businesses that don't get paid straight away * A system that tracks true financial position as it captures money owed and money owed to others * Helpful if dealing with lots of contracts or large amounts of money.   Disadvantage:   * More complicated than cash accounting |

1. Explain the two accounting principles on which the calculation and reporting of depreciation is based.

Their response may include but is not limited to:

The Cost Principle requires that the Depreciation Expense reported on the income statement, and the asset amount that is reported on the balance sheet, should be based on the historical (original) cost of the asset and not on the amounts based on the cost to replace the asset, or on the current market value of the asset.

The Matching Principle requires that an asset's cost be allocated to the depreciation expense over the life of the asset. This means that the cost of the asset is divided up with some of the cost being reported on each of the income statements issued during the life of the asset. By assigning a portion of the asset's cost to various income statements, the accountant is matching a portion of the asset's cost with each period in which the asset is used. This will also ensure that the asset's cost is being matched with revenues earned by using the asset.

1. List three types of budgets.

The student must list three types of budget. Their response may include but is not limited to:

* Master budget
* Sales budget
* Cost of sales budget
* Purchasing budget

1. List three key features of A New Tax System (GST) Act 1999.

The student must three key features of A New Tax System (GST) Act 1999. Their response may include but is not limited to:

* The GST Act sets out how, and from whom GST is to be collected. It is the end consumer who is meant to pay the tax, so when a business buys a product from a manufacturer, they pay tax on it, then claim credit on that from the GST they collect from the final sale.
* It describes what goods and services attract GST, and which not. For instance, fresh food and bread is GST free, as are medical services.
* Companies and individuals have to register for GST if they have a GST turnover (gross income minus GST) of $75 000 or more.
* The Act describes how GST is to be reported, and how often. For instance, most businesses need to submit quarterly or monthly Business Activity Statements to the ATO.

1. Outline the four main taxation and superannuation obligations for a business.

The student must outline the four main taxation and superannuation obligations for a business. Their response may include but is not limited to:

* Goods and Services Tax (GST): a broad-based tax of 10% levied on most goods and services sold or consumed in or imported into Australia.
* Pay As You Go (PAYG): system of withholding income tax from salary and wage payments to employees and remitting those amounts to the ATO. The system is also used to collect the Medicare levy and Higher Education Contribution Scheme (HECS) debts.
* Fringe Benefits Tax (FBT): tax paid on certain benefits provided by employers to their employees or an employee’s associates in place of part of their salary or wages. This can include voluntary agreements between employers and employees known as salary sacrifice agreements.
* Superannuation Guarantee: a levy applied to employers to provide superannuation contributions on behalf of employees, with contributions paid to a complying superannuation fund, retirement savings account, or to the ATO.

1. List three types of records that a company must keep for tax purposes.

The student must list three types of records. Their response may include but is not limited to

* Records of payments received
* Records of expenses related to payments received
* Records of tax-deductible gifts.

1. Explain why the ATO conducts audits.

The student must explain why the ATO conducts audits. Their response may include but is not limited to:

ATO conduct audits when they consider that a business may be trying to evade taxes or fraud is suspected.

1. List three key principles that should be followed when managing a work team.

The student must explain list three key principles that should be followed when managing a work team. Their response may include but is not limited to:

* Providing a common purpose
* Providing clear expectations
* Communicating
* Collaborating
* Being transparent

1. Describe the difference between a static and a flexible budget.

The student must describe the difference between a static and a flexible budget. Their response may include but is not limited to:

A static budget is one that remains unchanged during its life. A flexible budget takes account of changes in, for example, sales so that budget amounts can be varied according to sales and expenses.

1. Explain the relevance of electronic spreadsheets to budgeting.

The student must explain list three key principles that should be followed when managing a work team. Their response may include but is not limited to:

Electronic spreadsheets provide an automated way of inputting and calculating data which assists with analysis.

Electronic spreadsheets can be customised to suit the needs of the user and can be easily adapted over time.

Electronic spreadsheets are easy for a number of users to share. They can be uploaded to Google Drive for example and then the information viewed and updated by all.

1. Outline how often business’ must report GST.

The student must indicate how often must businesses report GST. Their response must include:

Every month or every quarter depending on the turnover of the business.

1. Describe the following terms associated with financial statements.

The student must describe the following terms associated with financial statements. Their response may include but is not limited to:

|  |  |
| --- | --- |
| Cash flow statements | Cash flow statement are used to provide information about a company's gross receipts and gross payments for a specified period of time. |
| Balance sheets | A balance sheet lists all of a business's assets and liabilities and works out the net assets.  It communicates information about the financial position of a business at a specific point in time.  It is essential to understand that balance sheets are only one part of users' information. It should be read in conjunction with other relevant financial information such as profit and loss statements. |
| Ledgers | There are typically two types of ledgers: general ledger where all accounts are maintained and subsidiary ledger consists of specific account information |
| Profit and loss statements | This measures the profit or loss by subtracting the expenses from revenues to arrive at the profit or loss. |

1. Describe a method that can be used to evaluate a budget or financial plan.

The student must describe a method that can be used to evaluate a budget or financial plan. Their response may include but is not limited to:

A budget or financial plan can be evaluated by assessing its effectiveness in achieving objectives.

Assessment Task 1: Checklist

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Student’s name: | | | | |
| Did the student provide a sufficient and clear answer that addresses the suggested answer for the following? | Completed successfully? | | Comments | |
| Yes | No |  | |
| Question 1 |  |  |  | |
| Question 2 |  |  |  | |
| Question 3 |  |  |  | |
| Question 4 |  |  |  | |
| Question 5 |  |  |  | |
| Question 6 |  |  |  | |
| Question 7 |  |  |  | |
| Question 8 |  |  |  | |
| Question 9 |  |  |  | |
| Question 10 |  |  |  | |
| Question 11 |  |  |  | |
| Question 12 |  |  |  | |
| Question 13 |  |  |  | |
| Question 14 |  |  |  | |
| Task outcome: | * Satisfactory | | | * Not satisfactory |
| Assessor signature: |  | | | |
| Assessor name: |  | | | |
| Date: |  | | | |

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| A close up of a logo  Description automatically generated | Assessment Task 2: Project Portfolio |

Information for assessors

In this task, students are required to demonstrate their skills and knowledge by working through a number of activities and completing and submitting a project portfolio.

You will also observe students participating in interactions. This can be in person or via a video recording.

Students will need access to:

* a suitable place to complete activities that replicates a business environment including a meeting space and computer and internet access
* workplace policies and procedures relating to financial management (included in the BSBFIN501 Simulation Pack for students completing this assessment for the case study organisation).
* workplace budgets and financial plans (included in the BSBFIN501 Simulation Pack for students completing this assessment for the case study organisation).
* their *Student Assessment Tasks*
* their learning resources and other information for reference
* *Project Portfolio* template.

Ensure that you:

* review the advice to assessors regarding administering practical assessment in the *Business Works Assessor User Guide*
* provide students with a due date for assessment
* follow your organisation’s policies and procedures
* refer to your organisation’s Training and Assessment Strategy
* provide written feedback to each student
* provide resubmission guidance to students (including a timeline) who do not complete the task satisfactorily
* complete the Assessment Task 2 Checklist which can be found at the end of this task
* complete the Final Results Record which can be found at the end of this Assessment Marking Guide.

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| **i** | **Assessment delivery information** |
| Assessment delivery information which has been contextualised to your RTO’s student cohort can be found in Appendix A of the *Business Works Assessor User Guide*.­Use this information to advise students of:   * where this task should be completed * the maximum time allowed for completing this assessment task * whether or not this task is open-book.   *Note*: Students should complete and submit an assessment cover sheet with their work. A template is provided in Appendix C of the Assessor User Guide but you should refer to your organisation’s policies and procedures.   * Students must submit:   + a completed *Project Portfolio*. |

Information for students

In this task, you are required to demonstrate your skills and knowledge by working through a number of activities and completing and submitting a project portfolio.

You will need access to:

* a suitable place to complete activities that replicates a business environment including a meeting space and computer and internet access
* workplace policies and procedures relating to financial management (included in the *BSBFIN501 Simulation Pack* for students completing this assessment for the case study organisation)
* workplace budgets and financial plans (included in the *BSBFIN501 Simulation Pack* for students completing this assessment for the case study organisation)
* your learning resources and other information for reference
* *Project Portfolio* template.

Ensure that you:

* review the advice to students regarding responding to written tasks in the *Business Works Student User Guide*
* comply with the due date for assessment which your assessor will provide
* adhere with your RTO’s submission guidelines
* answer all questions completely and correctly
* submit work which is original and, where necessary, properly referenced
* submit a completed cover sheet with your work
* avoid sharing your answers with other students.

|  |  |
| --- | --- |
| **i** | **Assessment information** |
| Information about how you should complete this assessment can be found in Appendix A of the *Business Works Student User Guide*.Refer to the appendix for information on:   * where this task should be completed * how your assessment should be submitted.   *Note*: You must complete and submit an assessment cover sheet with your work. A template is provided in Appendix B of the Student User Guide. However, if your RTO has provided you with an assessment cover sheet, please ensure that you use that. |

Activities

Complete the following activities:

1. Carefully read the following:

|  |  |
| --- | --- |
| Atom | This assessment requires you to demonstrate your skills and knowledge in managing budgets and financial plans.  This project can be based on the case study business in the BSBFIN501 Simulation Pack or you may like to base this on your own business, or a business you are currently working for or are familiar with. Speak to your assessor to get approval if you want to base this on your own business or one you work for.  You will be collecting evidence for this unit in a Project Portfolio. The steps you need to take are outlined below. |

1. Preparation

|  |  |
| --- | --- |
| Person eating | Make sure you are familiar with the business you are basing this assessment on and have read through the necessary background information and policies and procedures. For the case study business, this is all of the documents included in the BSBFIN501 Simulation Pack. If it’s your own business or a business where you are working or are familiar with, it’s important at this step that you have your business or case study approved by your assessor.  Complete *Page 4* of your Project Portfolio for this unit.  Read through the requirements of *Section 1, 2, 3 and 4 of your Project Portfolio* which include detailed guidance relevant to all the assessment activities.  Remember to create logical folders for all of your work and in the final assessment task you will submit a screenshot of these folders. This will ensure you follow record keeping requirements.  Assessor: if the student is using their own business, make sure that the business is suitable and meets the criteria above and the student can access all the documents required. If using a case study business, refer to the Simulation Pack.  Check *page 4* of their *Project Portfolio* prior to proceeding. |

1. Plan financial management approaches.

|  |  |
| --- | --- |
| Person eating | You are required to plan financial management approaches for a business. This involves:   * Accessing, reviewing and then reporting on the budget and financial plans relevant to your team or department. * Evaluating budget and financial plan outcomes. * Preparing contingency plans in case plans need to be varied. * Identifying if any changes need to be made to the budget and financial plans and negotiating these changes.   If you are completing this for the case study business, you will answer all the questions in your Portfolio based on your Simulation Pack. If it is your own business, you will need to access the budgets and financial plans relevant to your team or department, as well as relevant workplace policies and procedures. |
| Document | Complete Section 1 of your Project Portfolio.  Submit your Portfolio to your assessor.  Assessor: see Section 1 of the Project Portfolio Assessor for guidance with marking. Approve to continue to the next step or provide feedback and request a resubmission. |

1. Preparing to implement financial management plans

|  |  |
| --- | --- |
| Person eating | You are to prepare a presentation to provide to your team. This can be any format you wish as per the instructions in your Portfolio. The purpose of the presentation is to:   * communicate the details of the agreed budget and financial plans * provide support to your team in order to implement the budgets and financial plans * provide information to your team about financial management processes to monitor expenditure, controls costs and adjust contingency plans as required.   Prepare your presentation following the guidelines in your Portfolio. Make sure your presentation has a logical structure and is in language that your team can understand. Your presentation will last for approximately 15 minutes and you will need to ensure you provide the opportunity for other students to answer questions. |
| Document | Complete Section 2 of your Project Portfolio.  Submit your Portfolio to your assessor. Your assessor will then advise you of the date and time of your presentation, as well as the students who will be participating.  Assessor: see Section 2 of the Project Portfolio Assessor for guidance with marking. Approve to continue to the next step or provide feedback and request a resubmission.  The presentation may be held in person or online depending on the mode of delivery. Organise a small group of students. Each student will present their work while the other members of the group listen. Ensure that each student knows they have a space of 15 minutes to present their work and that they should allow time for questions. You may view this in person or watch a recording. If any students did not satisfactorily participate as per the instructions above and the guidance in the checklist then they will need to redo this prior to proceeding to the next steps. |

1. Implementing financial management plans

|  |  |
| --- | --- |
| Chat | In a group round-table style discussion with a student group of approximately two or three, you will provide your presentation.  Each person will have a turn (15 minutes per person) to present their work.  Your assessor will be looking to see that you can:   * demonstrate effective communication skills including:   + Speaking clearly and concisely   + Using non-verbal communication to assist with understanding   + Asking questions to identify required information   + Responding to questions as required   + Using active listening techniques to confirm understanding * Use language that your audience can understand. |
| **i** | This can either be viewed in person by your assessor or you may like to video record the session for your assessor to watch later. Your assessor can provide you with more details at this step. Make sure you follow the instructions above and meet the timeframes allocated. |
|  | Assessor: complete the checklist regarding the students’ presentation at the meeting. |

1. Monitoring and evaluating financial management plans

|  |  |
| --- | --- |
| Person eating | If you are using the case study business you are to complete this activity. If you are using your own business, you may analyse information on the budget and expenditure. If this is not possible, you may also complete this same activity.  Assume it is the end of the reporting period. Review the information in the simulation pack and report on:   * Expenditure and income * Actual versus forecasted budget * Effectiveness of the financial management processes as per the team’s feedback * Recommended improvements to financial management processes.   Work on Section 3 of your Project. |

1. Implement agreed improvements

|  |  |
| --- | --- |
| Person eating | You are to implement one of the recommendations you have identified in the previous activity and provide the required evidence. Follow the instructions in your Portfolio to complete this task. |
| Document | Complete Section 3 of your Project Portfolio.  Submit your Portfolio to your assessor.  Assessor: Review the student’s improvement that they have completed. Provide them with feedback that they should then review and develop an evaluation based on your feedback. They will then complete the final section of their Portfolio. Your feedback can be verbal or in writing. |

1. Evaluate improvement.

|  |  |
| --- | --- |
| Person eating | You are to evaluate the improvement you implemented in the previous activity and provide the required evidence. Follow the instructions in your Portfolio to complete this task. |
|  | Complete Section 4 of your Project Portfolio. |

1. Submit your completed Project Portfolio

|  |  |
| --- | --- |
| Document | Make sure you have completed all sections of your Project Portfolio, answered all questions, provided enough detail as indicated and proofread for spelling and grammar as necessary.  Submit to your assessor for marking. |
|  | Assessor: see Project Portfolio Assessor for guidance with marking. Detailed guidance has been provided for you in all sections. |

Assessment Task 2: Checklist

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Student’s name: | | | | | |
| Did the student: | | Completed successfully? | | | Comments |
| Yes | No | |  |
| Manage the budget and financial plan of an organisation for one reporting period?  As evidenced by the student’s Project Portfolio fulfilling the requirements of Project Portfolio Assessor – Section 1,2, 3 and 4. | |  |  | |  |
| Access and review budget and financial plans for work team?  As evidenced by the student’s Project Portfolio Section 1 fulfilling the requirements of Project Portfolio Assessor – Section 1. | |  |  | |  |
| Evaluate budget and financial plan outcomes?  As evidenced by the student’s Project Portfolio Section 1 fulfilling the requirements of Project Portfolio Assessor – Section 1. | |  |  | |  |
| Negotiate at least one change required to be made to budget and financial plans?  As evidenced by the student’s Project Portfolio Section 1 fulfilling the requirements of Project Portfolio Assessor – Section 1. | |  |  | |  |
| Develop contingency plans in case that the initial budget/financial plan needs to be varied?  As evidenced by the student’s Project Portfolio Section 1 fulfilling the requirements of Project Portfolio Assessor – Section 1. | |  |  | |  |
| Communicate details of agreed budget and financial plans to relevant team members?  As evidenced by the student’s presentation as attached at Project Portfolio Section 2, as well as their participation in the meeting as per the instructions for activity step 2.5. | |  |  | |  |
| During the presentation, demonstrate effective communication skills including:   * speaking clearly and concisely   You could understand what the student said   * using non-verbal communication to assist with understanding   Such as nodding to indicate understanding, smiling to facilitate communication.   * asking questions to identify required information   By asking relevant questions   * responding to questions as required   By providing a clear and concise and relevant response to the question asked   * using active listening techniques to confirm understanding?   By paraphrasing information or feedback provided to confirm understanding | |  |  | |  |
| Support team members to access resources and systems to perform required roles?  As evidenced by the student’s presentation as attached at Project Portfolio Section 2, as well as their participation in the meeting as per the instructions for activity step 2.5. | |  |  | |  |
| Implement processes to monitor actual expenditure, control costs and modify contingency plans and according to financial objectives?  As evidenced by the student’s presentation as attached at Project Portfolio Section 2, as well as their participation in the meeting as per the instructions for activity step 2.5. | |  |  | |  |
| Report on budget and expenditure?  As evidenced by the student’s Project Portfolio Section 3 fulfilling the requirements of Project Portfolio Assessor – Section 3. | |  |  | |  |
| Collect and assess information on effectiveness of financial management processes within work team?  As evidenced by the student’s Project Portfolio Section 3 fulfilling the requirements of Project Portfolio Assessor – Section 3. | |  |  | |  |
| Analyse variance between actual and budgeted finances?  As evidenced by the student’s Project Portfolio Section 3 fulfilling the requirements of Project Portfolio Assessor – Section 3. | |  |  | |  |
| Identify and recommend improvements to existing financial management processes?  As evidenced by the student’s Project Portfolio Section 3 fulfilling the requirements of Project Portfolio Assessor – Section 3. | |  |  | |  |
| Implement agreed improvements as per the financial objectives of work team and organisation?  As evidenced by the student’s Project Portfolio Section 3 fulfilling the requirements of Project Portfolio Assessor – Section 3. | |  |  | |  |
| Evaluate and report on agreed improvements to financial management processes?  As evidenced by the student’s Project Portfolio Section 3 fulfilling the requirements of Project Portfolio Assessor – Section 4. | |  |  | |  |
| Task outcome: | Satisfactory | | | Not satisfactory | |
| Assessor signature: |  | | | | |
| Assessor name: |  | | | | |
| Date: |  | | | | |