



# Diploma of Project Management AQF Level 5

  

## Assessment Criteria

**\*Please refer to checklist on the last page**

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## HOW TO COMPLETE YOUR ASSESSMENT

This book has been designed to assist you in achieving your competency level assessment through a systematic and relatively simple process. We encourage you to read and understand the requirements and should you have any concerns please do not hesitate to contact us so that we can assist you in completing the assessment.

### Your Assessment

The process you will be following is known as a competency-based assessment. The difference between this process and traditional forms of assessments is that evidence of your current skills and knowledge will be measured against national and international standards of best practice, not against the learning you have undertaken either recently or in the past. Furthermore, the assessment will be concerned with how you apply the skills and knowledge in your workplace, not in the training room or in a hypothetical case study.

The standards used are known as Competency Standards and are endorsed by industry groups and national bodies here and overseas.

When your assessment is successful against these standards, your skills and knowledge will be deemed to be equal to national and international best practice, and the qualification you gain will reflect this.

### Using the Assessment Guidelines

The criteria by which you will be assessed are listed in this book. Also listed is the underpinning knowledge you will be questioned on either by written or verbal assessment.

Included is the evidence you may bring forward to show that your competencies (that is, your skills and knowledge as they are applied in your workplace) match the desired standards. This evidence will be assessed and judged and any recommendations made from this.

There are only two recommendations that will be made as a result of your assessment – the evidence you have brought forward shows that you are:

- competent against the national standards and need produce no more evidence, or
- you are not yet competent, in that evidence you have provided doesn't yet show your skills and knowledge to be equivalent to the national standards – you will be asked to bring forward other evidence

Please Note: You may find that as a result of your assessment you are 'competent' in some areas but 'not yet competent' in others. This is okay. Where you have been assessed as 'competent', these areas need not required any further production of evidence leaving you free to concentrate on the others. Your assessor will explain this to you further at the time of you assessment.

## Evidence

Evidence of competency can be shown in any one, of a number of ways:

- Direct examination of evidence – either by written exam to ascertain your underpinning knowledge or by observation of you carrying out the task
- Oral or written questions – these help the assessor get a better understanding of why you do, or have done, certain things in the manner shown
- Supporting evidence – from workmates, current or former employers and supervisors, or others who have worked with you and know the quality and degree of skills and knowledge you possess. Such evidence doesn't necessarily have to come from formal or full-time work you've done in the past – it might be voluntary or part-time work, or it might even be from a different area altogether such as sports, home duties or hobbies
- Historical evidence – such things as qualifications, certificates, reports etc. These will show that you were capable of demonstrating the required level of competence in the past. In some cases historical evidence might have to be supported by direct evidence that shows your skill and knowledge is still current.

Any of these can be presented as written evidence, video-taped performance or audio tapes of such things as interviews, counselling sessions etc, or supporting evidence given verbally by friends or workmates.

Your evidence will be assessed against the Element and the Performance Criteria of the Units of Competency you nominate. Don't be put off if you can only find, for example, Direct Evidence for one part of the Element and Performance Criteria and Historical Evidence for the rest – this is okay. The assessor will decide whether or not it meets the Rules of Evidence and that is all that matters.

What is important is that your evidence satisfied your assessor as to the level and degree of your skills and knowledge when measure against the competency standards.

## How the Assessment is Carried Out

When you feel that you are ready to have your skills and knowledge assessed, you should arrange for the assessor to observe the activity you are claiming competency in. If you do not have the time or resources to provide direct observation of your skills and knowledge you can provide written or other evidence and this is known as a Portfolio of Evidence. The majority of your assessment for this qualification will be through a 'Portfolio of Evidence'.

A Portfolio of Evidence is simply a compilation of all of your evidence into a manageable and easily handled folder. Once you have sufficient evidence to support your claim for competency you should submit this folder for assessment. **Don't forget to clearly mark which piece of evidence related to which Element of Competency and Performance Criteria.**

During the assessment, the assessor will first of all scan the evidence you bring forward or are demonstrating to ensure that it meets the broad requirements of the competency standards, and that:

- the activity is being or has been performance safely (whether the standards specify this or not);
- the evidence appears to meet the criteria and range of variables;
- there are no legislative or legal issues arising out of the evidence (for example, there are no obvious commercially confidential items or information being brought forward, or that there are no breaches of such things as EEO or OS&H legislation);
- the evidence appears to meet the Rules of Evidence (see below); and
- whether or not the evidence being brought forward covers the entire range of competencies or only certain performance criteria or elements

The evidence will then be judged against the competency standards.

### **The Rules of Evidence**

When making a judgement about your evidence, the assessor will be looking for:

- Validity – does your evidence relate to the standards you are seeking assessment against or are they more closely related to something else?
- Authenticity – does your evidence reflect something you have actually done either in full or in part?
- Currency – does your evidence show that you can perform this activity now or in the future, including you having up to date knowledge?
- Reliability – will your evidence be capable of showing the same outcomes no matter how many times it is assessed or how many assessors carry out the assessment?
- Sufficiency – is there sufficient evidence to show you competency or will there need to be more (or supporting) evidence brought forward?

These are the questions the assessor will ask themselves when assessing and judging your evidence. It will be very helpful to them if you ask yourself these questions before selecting and presenting the evidence – time, and a lot of frustration and heartache, may be saved if you do.

## Notes on Completing this Book

Under the National Framework for the Recognition of Training, the smallest part of the standards for which you can gain a full qualification is the Unit. To make the achievement of this easier for you, each Unit is broken down into individual Elements against which you will be assessed.

Each element is accompanied by a set of Assessment Criteria. These show the standard to which you should be displaying your skills and knowledge. Where and how you display these is detailed in the Assessment Requirements.

Please take careful note of the **Assessment Requirements**. In this section will be found details of the type of evidence you will be expected to bring forward to demonstrate your competency. This evidence will be sought either through a formal (written or demonstrated) examination or from work you are currently doing or have done in the past. (This is known as Recognition of Prior Learning – RPL – and, in most cases, can provide you with all the evidence you may need to gain the qualification. Speak to your assessor about this.)

When completing your assessment, you will be asked a number of questions in relation to the assessment. Explanations of these questions are as follows:

### **Question 1: How was the achievement of this element demonstrated?**

In order to be assessed as competent at an Element, you must have convinced your assessor that you are able to meet all of the Assessment Criteria across the Evidence Requirements. You will probably have carried out many tasks counting towards a particular Element over a period of time, but you don't have to list everything you've done – only those that may provide the strongest source of evidence to support your claim.

Be sure to include sufficient details to show competence across all of the Assessment Criteria.

### **Question 2: Over what period of time/number of occasions?**

Here you will need to provide details of the period of time over which you were assessed for this Element and/or the number of occasions on which the task was carried out for assessment purposes. For example, if you were assessed three times over a period of four weeks this information would be put in here.

This helps the assessor see that the competency you have claimed isn't a 'flash in the pan' and that you can actually perform consistently at the desired level.

### **Question 3: In what situation/locations?**

Some candidates will do everything in one place, usually their normal workplace, and in that case will put the name of their office/workshop here. Others, however, may do some of the work at clients' premises or out in the field.

Where the activity was carried out isn't as important as the fact that you record it. The assessor will need this information to help them make an informed judgement about the conditions and situations in which you are applying your skills and knowledge. The quality of evidence can then be judged along with any special circumstances surrounding how the evidence was gained.

#### **Question 4: What is the evidence and where can it be found?**

The Assessment will provide a record of what you have achieved. To maintain proof of this achievement it is important that you keep an up to date record of what it is and where it can be found. This will be especially important if you are thinking of applying for assessment against a higher level of competency standards where the evidence you are developing may be usable then.

Evidence may be provided by a whole variety of things depending on your particular circumstances and the Elements against which you are seeking assessment. Some of these Elements state what is required, and this must be followed, but others may not be as specific and this is where common sense must be used.

Where possible, you should seek advice from your assessor or RPL advisor to make sure what you're thinking is in line with the needs of the standards.

Throughout your initial interview or training session you will have discussed what may or may not be useful or sufficient evidence of competency against the standards. You should refer to your notes for ideas on where to start collecting evidence or talk to your assessor.

#### **Common Range of Variables**

The Range of Variables used to relate to the context and conditions under which or through which the Element and Assessment Criteria are to be performed for the purposes of the assessment.

There are a number of Ranges that are common to all Units. To reduce unnecessary duplication, these are listed below:

Higher project authorities may be:

- the client/customer
- the manager (in larger projects where the individual is section head or sub-project leader)
- other personnel within the project/organisation designated specific authority over certain aspects of the project
- the program/maintenance managers
- higher management within the organisation

**Stakeholders** may be from: within the project, other activities affected by this project, the client/customer, suppliers/contractors and/or the parent organisation.

**The Client** is the authority, or authorities, for whom the task is being undertaken. The client may be internal or external to the organisation. The client may be the customer, the owner, the sponsoring authority in the case of projects where a contract does not exist, or it may be an authority specifically designated as the client.

#### **Further Information**

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**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM03 Planning and Scheduling Techniques*

**UNITS OF COMPETENCIES:**

BSBPMG503A Manage Project Time

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG503A Manage Project Time

**BSBPMG503A/01 Determine Project Schedule**

- 1.1 Determine the duration and effort, sequence and dependencies of tasks from the scope definition as the basis for the project schedule
- 1.2 Obtain input and approval for the project schedule from stakeholders
- 1.3 Select and use **methods, techniques and tools**, within **delegated authority**, to determine preferred schedule, *time management plan/s*, resource allocation and financial requirements
- 1.4 Obtain agreement to the schedule from relevant project authority and communicate this agreement to stakeholders to provide the basis for measurement of progress

**BSBPMG503A/02 Implement Project Schedule**

- 2.1 Implement mechanisms to measure, record and report progress of activities in relation to the agreed schedule and plans
- 2.2 Conduct ongoing analysis of options to identify variances and to forecast the impact of changes to the schedule
- 2.3 Review progress throughout the project life cycle and implement agreed schedule changes to ensure consistency with changing scope, objectives and constraints related to time and resource availability.
- 2.4 Develop responses to perceived, potential or actual schedule changes, ensure agreement by a higher project authority, and implement to maintain project objectives.

**BSBPMG503A/03 Assess Time Management Outcomes**

- 3.1 Review project outcomes are from available *records* and information to determine the effectiveness of time management activities
- 3.2 Identify and document time management issues and recommended improvements, and pass on to relevant project authority for application in future projects.

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstrated successful application of time management tools and techniques to ensure objectives are met on multiple complex projects
- Knowledge of time management methodologies, their capabilities, limitations, application and outcomes

**ASSESSMENT MUST ENSURE:**

- Access to workplace documentation, schedules, reports from project team
- Consideration of feedback from project stakeholders regarding the management of project time

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM04 Controlling and Capturing Costs*

**UNITS OF COMPETENCIES:**

BSBPMG504A Manage Project Costs

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG504A Manage Project Costs

**BSBPMG504A/01 Determine Project Costs**

- 1.1 Determine resource requirements for individual tasks, with input from stakeholders and guidance from **others**
- 1.2 Estimate **project costs** to enable budgets to be developed and implement agreed cost management processes
- 1.3 Develop and implement a cost management plan, within **delegated authority**, to ensure clarity of understanding and ongoing management of project finances

**BSBPMG504A/02 Monitor and Control Project Costs**

- 2.1 Implement agreed **financial management processes and procedures** to monitor actual expenditure and to control costs
- 2.2 Select and use cost analysis methods and tools to identify cost variations, evaluate options and recommend actions to a higher project authority
- 2.3 Implement, monitor and modify agreed actions to maintain financial and overall project objectives throughout the project life cycle

**BSBPMG504A/03 Conduct Financial Completion Activities**

- 3.1 Conduct appropriate activities to signify financial completion
- 3.2 Review project outcomes using available records and information to determine the effectiveness of cost management processes and procedures
- 3.3 Review cost management issues and identify improvements

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstrated evidence of monitoring project costs across the project life cycle for multiple complex projects
- Knowledge of budgeting processes, tool and techniques

**ASSESSMENT MUST ENSURE:**

- Access to workplace documentation including budgets, financial documents
- Consideration of feedback from project stakeholders on how costs were managed

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM05 Quality Management*

**UNITS OF COMPETENCIES:**

BSBPMG505A Manage Project Quality

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

**BSBPMG505A Manage Project Quality**

**BSBPMG505A/01 Determine Quality Requirements**

- 1.1 Determine **quality objectives** standards and levels, with input from stakeholders and guidance of a higher project authority, to establish the basis for quality outcomes and a **quality management plan**
- 1.2 Select and use established **quality management methods, techniques and tools** to determine preferred mix of quality, capability, cost and time
- 1.3 Identify quality criteria, obtain agreement from a higher project authority and communicate to stakeholders to ensure clarity of understanding and achievement of quality and overall project objectives
- 1.4 Include agreed quality requirements in the project authority and implement as basis for performance measurement

**BSBPMG505A/02 Implement Quality Assurance Processes**

- 2.1 Measure and document results of project activities and product performance throughout the project life cycle to determine compliance with agreed quality standards
- 2.2 Identify causes of unsatisfactory results, in consultation with the client, and recommend appropriate actions to a higher project authority to enable continuous improvement in quality outcomes
- 2.3 Conduct inspections of quality processes and **quality control** results to determine compliance of quality standards to overall quality objectives
- 2.4 Maintain a quality management system to enable effective recording and communication of quality issues and outcomes to a higher project authority and stakeholders

**BSBPMG505A/03 Implement Project Quality Improvements**

- 3.1 Review processes and implement agreed changes continually throughout the project life cycle to ensure continuous quality improvement
- 3.2 Review project outcomes against performance criteria to determine the effectiveness of quality management processes and procedures
- 3.3 Identify and document lessons learned and recommended *improvements*, and pass on to a higher project authority for application in future projects

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstrated evidence of successfully managing project staff so that quality outcomes were achieved on multiple complex projects
- Knowledge of a range of quality management tools, techniques and methodologies

**ASSESSMENT MUST ENSURE:**

- Access to project documentation which includes quality criteria and evidence of quality monitoring and improvement practices
- Consideration of feedback from project stakeholders regarding project quality management

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM06 Project Human Resources Management*

**UNITS OF COMPETENCIES:**

BSBPMG506A Manage Project Human Resources

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG506A Manage Project Human Resources

**BSBPMG506A/01 Implement Human Resource and Stakeholder Planning Activities**

- 1.1 Identify project stakeholders and verify their expectations in order to quantify project outcomes
- 1.2 Determine resources requirements for individual tasks, with input from stakeholders and guidance from a higher project authority, to determine project staffing levels and required competencies
- 1.3 Establish **project organisation and structure** to align individual and group competencies with project tasks
- 1.4 Allocate **staff** to the project with the approval of a higher project authority, to meet work requirements throughout the project life cycle
- 1.5 Develop and use **HRM methods, techniques and tools** to implement procedures and plans to ensure clarity of understanding and ongoing HRM

**BSBPMG506A/02 Implement Staff Training and Development**

- 2.1 Communicate designated staff responsibilities, authority and individual performance measurement criteria to the project team and other relevant stakeholders, to ensure clarity of understanding of the work and to provide a basis for ongoing assessment
- 2.2 Identify, plan and implement ongoing development and training of project team members to achieve HRM and overall project objectives, with agreement of a higher project authority
- 2.3 Measure individuals' performance against agreed criteria and initiate actions to overcome shortfalls in performance and encourage career progression

**BSBPMG506A/03 Manage the Project Team and Stakeholders**

- 3.1 Implement processes to promote continuous improvement of staff, and take actions to improve staff and overall project effectiveness
- 3.2 Monitor and report internal and external influences on individual and project team member performance and morale to a higher project authority, if necessary, for remedial action
- 3.3 Implement established procedures for interpersonal communication, counselling and conflict resolution to maintain a positive working environment
- 3.4 Continually review stakeholder expectations to resolve expectation variance and ensure the project is on track to deliver expected outcomes
- 3.5 Identify and manage inter-project and intra-project conflict to minimise impact on achievement of project objectives

3.6 Identify and document human resource and stakeholder management issues, and recommended improvements, and pass on to higher project authority for application in future projects

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstrated evidence of successfully managing project staff so that outcomes were achieved on multiple complex projects
- Knowledge of HRM legislation, methods, techniques and tools

**ASSESSMENT MUST ENSURE:**

- Access to workplace documentation
- Consideration of feedback from project team and other stakeholders on how human resources were managed

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM08 Risk Management*

**UNITS OF COMPETENCIES:**

BSBPMG508A Manage Project Risk

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG508A Manage Project Risk

**BSBPMG508A/01 Determine Project Risks**

- 1.1 Identify, document and analyse **risks**, in consultation with stakeholders and higher project authority, as the basis for risk planning
- 1.2 Use established **risk management techniques and tools**, within **delegated authority**, to analyse risks, assess options and recommend preferred risk approaches
- 1.3 Develop risk management plans, secure agreement of stakeholders and communicate to ensure clarity of understanding and ongoing management risk of factors
- 1.4 Establish designated **risk management processes and procedures** to enable effective management and communication of risk events, responses and results

**BSPM508A/02 Monitor and Control Project Risk**

- 2.1 Manage project in accordance with established project and risk management plans to ensure a common approach to the achievement of objectives
- 2.2 Monitor progress against project plans to identify variances and *recommend responses* to a higher project authority for remedial action
- 2.3 Implement agreed risk responses and modify plans to reflect changing project objectives in an environment of uncertainty

**BSBPMG508A/03 Assess Risk Management Outcomes**

- 3.1 Review project outcomes to determine effectiveness of risk management processes and procedures
- 3.2 Identify and document risk issues and recommended improvements, and pass on to a higher project authority for application in future projects

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstrated evidence of effective risk management for multiple complex projects
- Knowledge of risk management techniques, strategies and tools

**ASSESSMENT MUST ENSURE:**

- Access to workplace risk management documentation
- Consideration of feedback from project stakeholders as to how risks were managed

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM501 Project Integration*

**UNITS OF COMPETENCIES:**

BSBPMG501A Manage Application of Project Integrative Processes

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG501A Manage Application of Project Integrative Processes

**BSBPMG501A/01 Manage Integration of all Functions of Project Management**

- 1.1 Identify project stakeholders and their interest, with guidance of higher project authority
- 1.2 Analyse all **project management functions** with higher project authority and relevant stakeholders to determine achievable project objectives
- 1.3 Develop a **project plan** to integrate all project management functions to achieve outcomes and requirements for time, cost, quality and risk
- 1.4 Obtain endorsement of project plan by higher project authority
- 1.5 Establish designated control mechanisms to control planned activity

**BSBPMG501A/02 Coordinate Internal and External Environments**

- 2.1 Manage the project within an established **internal working environment** to ensure work is conducted effectively throughout the project
- 2.2 Maintain established links to align project objectives with organisation objectives throughout the project life cycle
- 2.3 Seek assistance, where necessary, from higher project authority to resolve conflicts which may negatively affect project objectives

**BSBPMG501A/03 Implement Project Activities throughout Life Cycle**

- 3.1 Ensure agreed project phases, approval points and review points occur
- 3.2 Report progress against established project baselines to measure performance throughout the project life cycle
- 3.3 Implement established *finalisation plans, procedures and activities***
- 3.4 Identify and document **integration management issues and recommended improvements**, and pass on to higher project authority for application to future projects

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Development of project plans for multiple complex projects
- Details of how plans were monitored and outcomes were reported
- Knowledge of project life cycle

**ASSESSMENT MUST ENSURE:**

- Access to project documentation relevant to project integration
- Access to feedback from project stakeholders

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM02 Scope Management*

**UNITS OF COMPETENCIES:**

BSBPMG502A Manage Project Scope

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG502A Manage Project Scope

**BSBPMG502A/01 Conduct Project Authorisations Activities**

- 1.1 Develop and confirm procedures for **project authorisation** with an **appropriate authority** as the basis for future project management activity and the commitment of resources and effort
- 1.2 Obtain authorisation to expend resources

**BSBPMG502A/02 Conduct Project Scope Definition Activities**

- 2.1 Identify project objectives, **deliverables**, constraints, exclusions, assumptions and principal work activities
- 2.2 Establish measurable project benefits and outcomes to enable evaluation of project performance
- 2.3 Establish agreement to a shared understanding of desired project outcomes with **relevant stakeholders**
- 2.4 Develop and implement scope management plan

**BSBPMG502A/03 Manage Application of Scope Controls**

- 3.1 Implement agreed **scope management** procedures and processes
- 3.2 Manage the impact of scope changes within established time, cost and quality constraints according to **change control procedures** and to meet project objectives
- 3.3 Review progress and record results to assess the effectiveness of scope management procedures
- 3.4 Identify and document scope management issues and recommended improvements, and pass on to higher project authority for application to future projects

**EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstration of scope management for multiple complex projects
- Knowledge of scope management plans, tools, issues and likely challenges

**ASSESSMENT MUST ENSURE:**

- Access to workplace documentation used to document and manage project scope
- Consideration of feedback from project stakeholders regarding the management of project scope

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM07 Project Communications Management*

**UNITS OF COMPETENCIES:**

BSBPMG507A Manage Project Communications

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG507A Manage Project Communications

**BSBPMG507A/01 Plan Communications Processes**

- 1.1 Identify, document and analyse information requirements, with input from stakeholders and guidance from a higher project authority, as the basis for communications planning
- 1.2 Develop, within **delegated authority**, an agreed communications management plan to ensure clarity of understanding and achievement of project objectives throughout the project life cycle
- 1.3 Establish and maintain designated **project management information system (PMIS)**, to ensure the quality, validity, timeliness and integrity of information and communication

**BSBPMG507A/02 Manage Project Information**

- 2.1 Manage the generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders within established systems and procedures to aid decision making processes throughout the project life cycle
- 2.2 Implement, modify, monitor and control designated information validation processes to optimise quality and accuracy of data
- 2.3 Implement and maintain agreed **communication networks** between staff, client and other stakeholders to ensure effective communications at appropriate levels throughout the project life cycle
- 2.4 Identify communication and information management system problems and report them to a higher project authority

**BSBPMG507A/03 Assess Communications Management Outcomes**

- 3.1 Conduct finalisation activities to ensure agreed ownership of, and responsibility for, information collected
- 3.2 Review project outcomes to determine the effectiveness of management information and communications processes and procedures
- 3.3 Identify and document lessons learned and recommended improvements, and pass on to higher project authority for application in future projects

**EVIDENCE OF THE FOLLOW IS ESSENTIAL:**

- Development and implementation of a range of project communications that facilitate effective outcomes for multiple complex projects
- Knowledge of the place of communications within the project life cycle

**ASSESSMENT MUST ENSURE:**

- Access to project communication documentation
- Consideration of feedback from project team members and other stakeholders as to how effectively communication was managed

**QUALIFICATION:** *Diploma of Project Management AQF Level 5*

**WORKSHOP TITLE:** *PM09 Project Procurement*

**UNITS OF COMPETENCIES:**

BSBPMG509A Manage Project Procurement

**ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:**

BSBPMG509A Manage Project Procurement

**BSBPMG509A/01 Determine Procurement Requirements**

- 1.1 Identify procurement requirements with input from stakeholders as the basis for procurement planning and the contract
- 1.2 Establish and maintain, within ***delegated authority***, an agreed ***procurement management plan*** and strategies to ensure clarity of understanding between stakeholders and achievement of project objectives

**BSBPMG509A/02 Establish Agreed Procurement Processes**

- 2.1 Obtain information from established sources capable of fulfilling procurement requirements to determine how project objectives can be met
- 2.2 Adopt established selection processes and selection criteria, including occupational health and safety (OHS) requirements, and communicate to stakeholders and prospective contractors or suppliers to ensure fair competition
- 2.3 Obtain approvals for procurement processes to be used for the project from a higher project authority to enable formal discussions to be conducted

**BSBPMG509A/03 Conduct Contracting and Procurement Activities**

- 3.1 Communicate agreed proposals and/or specifications to prospective contractors or suppliers to ensure clarity of understanding of project objectives
- 3.2 Evaluate responses and select preferred contractors or suppliers in accordance with current legal requirements and agreed selection processes
- 3.3 Conduct negotiations with the preferred contractor or supplier, with guidance of a higher project authority if necessary, to agree on contract terms and conditions, establish common goals and minimise uncertainty

**BSBPMG509A/04 Implement the Contract and/or Procurement**

- 4.1 Implement established procurement management plan and make *modifications* with higher project authority approval to ensure a common approach to achievement of objectives
- 4.2 Review progress and manage agreed changes to ensure timely completion of tasks, resolution of conflicts and achievement of project objectives within the legal framework of the contract
- 4.3 Identify and report procurement management problems to a higher project authority, and implement agreed remedial actions to ensure project objectives are met

### **BSBPMG509A/05 Manage Contract and Procurement Finalisations Procedures**

- 5.1 Conduct finalisation activities to ensure contract deliverables meet contractual requirements
- 5.2 Review project outcomes using available **procurement records and information** to determine the effectiveness of contracting and procurement processes and procedures
- 5.3 Document lessons learned and recommended improvements, and pass on to higher project authority for application in future projects

### **EVIDENCE OF THE FOLLOWING IS ESSENTIAL:**

- Demonstrated experience in managing procurement and contracting processes in multiple complex projects
- Knowledge of contracts and legal obligations as they relate to project management

### **ASSESSMENT MUST ENSURE:**

- Access to workplace documentation in the area of procurement and contracts
- Consideration of evidence from stakeholders as to how procurement was managed

**EVIDENCE CHECKLIST**

I have the evidence required for assessment for the following units:

BSBPMG501A	Manage Application of Project Integrative Processes	<input type="checkbox"/>
BSBPMG502A	Manage Project Scope	<input type="checkbox"/>
BSBPMG503A	Manage Project Time	<input type="checkbox"/>
BSBPMG504A	Manage Project Costs	<input type="checkbox"/>
BSBPMG505A	Manage Project Quality	<input type="checkbox"/>
BSBPMG506A	Manage Project Human Resources	<input type="checkbox"/>
BSBPMG507A	Manage Project Communications	<input type="checkbox"/>
BSBPMG508A	Manage Project Risk	<input type="checkbox"/>
BSBPMG509A	Manage Project Procurement	<input type="checkbox"/>