



Advanced Diploma of Project Management AQF Level 6

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: *Advanced Diploma of Project Management*
AQF Level 6

WORKSHOP TITLE: *PM05 Quality Management*

UNITS OF COMPETENCIES:

BSBPM605A Direct Quality Management of Multiple
Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM605A Direct Quality Management of Multiple Projects/Programs

BSBPM605A/01 Direct Quality Requirements Development

- 1.1 Reviews and consultation are directed to ensure that the organisation's quality objectives, standards, levels and criteria are applied at the project level in consultation with stockholders
- 1.2 *Quality management* methods, techniques and tools are modified to the requirements of the program, as necessary, and directed for project team use
- 1.3 Program quality criteria are identified and communicated to project managers for implementation
- 1.4 Project managers are directed to develop and implement quality plans that will be used as the basis for performance measurement

BSBPM605A/02 Direct Quality Assurance Management

- 2.1 Results of project activities and product performance are analysed to determine compliance with agreed quality standards throughout the project life cycles within the program
- 2.2 Causes of unsatisfactory results are identified in consultation with project managers, and through clients and stakeholders, and appropriate actions are initiated to enable continuous improvement in quality outcomes
- 2.3 Inspections of quality processes are directed and results are analysed to determine compliance with quality standards set for the overall program and the organisation
- 2.4 A *quality management system* is developed and maintained to enable effective management and communication of quality issues and outcomes

BSBPM605A/03 Improve Program and Projects' Quality

- 3.1 The quality management system is reviewed and modified continually throughout project activities to ensure project team commitment to continuous improvement of quality process and outcomes
- 3.2 Project outcomes review and analysis against performance criteria are directed to determine the effectiveness of the quality management system
- 3.3 *Quality improvements* and lessons learned are aggregated and used to benefit the business and later program initiatives/projects and, where appropriate, are passed to organisational management for consideration in support of strategic planning and (re)direction

EVIDENCE MUST BE PROVIDED OF:

- Responsibility that has been taken across multiple projects or a program for quality management of the projects including
- Evidence of managing the work of project managers and those working within the project teams.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing a program such as:

- lists of program quality stakeholders and quality objectives
- records of project selection and prioritisation processes and use of quality tools
- alignment ‘threads’ between the quality management system and procedures documentation applied in projects
- benefits quantification criteria and tracking documentation
- stakeholder expectations lists, and means of review across the program
- quality management plans
- records of direction for inspections, modifications and quality outcomes
- records of selection, management and direction for project teams’ modifications of quality management system
- quality control, quality assurance and continuous improvement processes
- documentation of quality management lessons learned
- relation of project quality outcomes to the continuous improvements objectives of the program and the organisation

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how quality requirements and outcomes were determined for projects and the program overall
- how quality tools were selected for use in projects
- how project managers were directed throughout the program with respect to their management of quality within projects
- how quality was managed throughout projects
- how quality-related problems and issues that are beyond the delegated authority of the project managers were processed, supported and resolved
- how projects were directed for review with respect to quality management
- how improvements to quality management of the program and projects have been used in future projects within the program

QUALIFICATION: *Advanced Diploma of Project Management*
AQF Level 6

WORKSHOP TITLE: *PM08 Risk Management*

UNITS OF COMPETENCIES:

BSBPM608A Direct Risk Management of Multiple
Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM608A Direct Risk Management of Multiple Projects/Programs

BSBPM608A/01 Direct Planning of Project Risk Management

- 1.1 Potential, perceived and actual risk events are directors for identification, documentation and analysis, in consultation with project managers and appropriate stakeholders, as the basis for project *risk management planning*
- 1.2 Project *risk management methods*, techniques and tools are selected and modified for project managers to analyse information, evaluate options and determine preferred risk approaches within the overall program environment
- 1.3 Project *risk management plans* and strategies are directed for development, communication and implementing to ensure clarity of understanding and achievement of project objectives throughout the program
- 1.4 A project risk management system is developed and maintained to enable effective management and communication of risk events, responses and results to stakeholders across projects within the program

BSBPM608A/02 Direct Management of Project Risk and Manage Program Risk

- 2.1 The program is managed in accordance with agreed project risk management plans
- 2.2 Progress is reviewed, variance is analysed and risk responses are initiated to achieve program and multiple project objectives in changing environments
- 2.3 Risks to multiple project outcomes are directed for monitoring, and remedial actions are authorised to achieve project objectives

BSBPM608A/03 Assess Project and Program Risk Management Outcomes

- 3.1 Project outcomes are reviewed and analysed to assess the effectiveness of the project risk management system for multiple projects, program and organisational outcomes
- 3.2 Lessons learned are aggregated, analysed and structured for feedback to project managers and senior management for strategic review and planning

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken for risk management across multiple projects or a program including:
- Evidence of managing the work of others including:
- project managers

- A range of stakeholders and
- Contributing agencies both within and beyond the organisation.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing program/projects such as:

- collated lists of potential risk events
- records of identification and prioritisation of multiple project risk events
- detailed records of project risk analysis, forecasts and predictions, and reappraisal
- program risk management plans
- details of development of, and direction to use, project risk management system
- details of modifications to project risk management system, plans and procedures
- documentation of formal risk management arrangements, for example contracts
- records of project risk management lessons learned and application in other projects
- program risk management lessons learned

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how multiple project risks were identified and documented for projects
- how project risk management plans were developed
- how project managers were managed throughout projects with respect to project risk management across the program
- how program risks were managed
- how problems and issues with respect to project and program risk were resolved
- how projects were reviewed with respect to risk management for impact on the program and the organisation
- how improvements to project risk management have been used in future projects

**QUALIFICATION: *Advanced Diploma of Project Management*
*AQF Level 6***

WORKSHOP TITLE: *PM07 Project Communications Management*

UNITS OF COMPETENCIES:

BSBPM607A Direct Communications Management of Multiple Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM607A Direct Communications Management of Multiple Projects/Programs

BSBPM607A/01 Direct Planning of Project Communications

- 1.1 Project information requirements are directed for identification, documentation and analysis, in consultation with appropriate stakeholders, as the basis for projects and program communications planning
- 1.2 *Communications management plans and activities* are directed for development and management to ensure clarity of understanding and achievement of multiple project objectives at all levels (organisation, operations, program and projects)
- 1.3 *Project management information system*, structure and procedures are developed to maintain the quality, validity, timeliness and integrity of information and communication across the program and in regard to organisational (strategic) management

BSBPM607A/02 Direct Management of Project Information

- 2.1 The generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders is directed to improve decision making processes and the communications throughout the program and between the projects
- 2.2 *Information validation* processes are directed for development, management and modification to ensure consistent quality and accuracy of data across the program

BSBPM607A/03 Manage Program Communications

- 3.1 Formal and informal communication networks between the organisation's management structure, program, projects and key stakeholders are developed and managed to ensure effectiveness throughout the multiple life cycles of projects within the program
- 3.2 Potential, perceived and actual problems with communication and management information systems are addressed through project managers, and remedial actions are authorised to ensure project, program and organisations objectives are met
- 3.3 Customer relationships beyond the delegated responsibility of project managers are managed to ensure clarity of understanding of objectives and to minimise conflict throughout the program

BSBPM607A/04 Analyse Communications Management Outcomes

- 4.1 Project finalisation activities are directed to ensure ownership of, and responsibility for, information outcomes
- 4.2 Project outcomes are reviewed and analysed to determine the effectiveness of management information and communications systems
- 4.3 Lessons learned across multiple projects are aggregated and used for other applications in the program and the organisation

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken across multiple projects or a program for communications management of the projects including:
- Evidence of managing others' work including:
- Project managers and
- A range of stakeholders within and external to the organisation

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing program such as:

- communications management plans and strategies
- project management information system
- progress reports upwards and downwards within the program and organisation
- records of meetings, outcomes and actions
- formal briefs, presentations, media releases and newsletters
- records of collection, validation, storage, retrieval, analysis and/or dissemination of information
- validation processes and post-validation modifications
- formal and informal communication networks
- records of communications problems, analysis and solutions
- records of communications management lessons learned

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how information requirements were determined for the program of projects
- how communication plans and associated processes were directed for development for projects
- how project team managers were managed throughout projects with respect to communications
- how information was managed across multiple projects within the program
- how project reporting processes were managed for multiple projects' outcomes across the program
- how communications problems and issues arising during projects were addressed
- how communications within the program were reviewed at finalisation
- how improvements to communications management of projects have been used in future projects entering the program

QUALIFICATION: *Advanced Diploma of Project Management*
AQF Level 6

WORKSHOP TITLE: *PM604 Earned Value Performance Management*

UNITS OF COMPETENCIES:

BSBPM603A Direct Time Management of Multiple
Projects/Programs

BSBPM604A Direct Cost Management of Multiple
Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM603A Direct Time Management of Multiple Projects/Programs

BSBPM603A/01 Direct Project Schedules Development

- 1.1 The duration and effort, sequence and interdependencies of major activities and milestones are determined from individual project plans to form the basis of the program schedule
- 1.2 Project managers are directed by the use of *time management* methods, *techniques and tools*, preferred schedules, *time management plans*, resource allocations and financial requirements to enable continuing update and refinement of the program schedule
- 1.3 Project schedules are agreed, formalised and communicated to stakeholders as the basis for planning, implementation and review of progress

BSBPM603A/02 Manage Program Schedules

- 2.1 Mechanisms are developed, implemented and modified to monitor, control, record and report actual progress in relation to the agreed schedule and plans
- 2.2 Ongoing analysis is conducted to identify and forecast variances and trends, and to develop responses so that projects meet their schedules
- 2.3 Durations of key activities and interdependencies between projects are managed to enable financial and resource rationalisation across the program of projects, to meet strategic expectations within the management/reporting period of the program
- 2.4 Progress is reviewed and the schedule is refined throughout the program life cycle to ensure consistency with changing scope, objectives and constraints related to time and resource availability
- 2.5 Responses to perceived, potential or actual projects' schedule changes are authorised to achieve program objectives

BSBPM603A/03 Analyse Time Management Outcomes

- 3.1 Multiple project and program outcomes are reviewed from available *records* and information and analysed to determine the effectiveness of the schedule and time management processes
- 3.2 Lessons learned are passed on to higher project authority and feedback is provided for application in planning and implementation of later projects within the program

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken across multiple projects or a program for managing time and scheduling of the projects including:
- Evidence of managing the output of work of others:
- including: Project Managers
- A range of stakeholders including higher management

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing the program and directing projects such as:

- application of lessons learned from previous project/s in authorising new projects
- time management strategies
- time management analysis, forecasts and predictions
- program work breakdown structure
- key activity schedules
- application of precedence and dependency principles to determine major activities, rationalisation and interdependencies for the program
- program schedule
- records of regular and ad hoc communication about schedules to stakeholders
- application of and modifications to monitoring, review and reporting mechanisms
- application of actual progress against planned progress
- records of corrective actions taken against variances in the program schedule
- records of lessons learned

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how project schedules management was directed and the program schedule managed
- how agreement on schedules was reached with relevant parties
- how project managers were directed throughout the projects with respect to time management within projects
- how schedules were coordinated and managed throughout the program
- how problems and issues with time management were identified and addressed
- how projects were reviewed with respect to time management of the program
- how improvements to time management of projects were used in future projects within the program

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM604A Direct Cost Management of Multiple Projects/Programs

BSBPM604A/01 Direct Project Budget Development

- 1.1 Project managers are directed to determine resource requirements for individual tasks, in consultation with appropriate stakeholders, to develop a project budget which contributes to the program budget
- 1.2 Project cost *estimation* is directed to enable budgets and cost management processes to be developed for the project life cycles
- 1.3 Cost strategies and *cost management plans* are directed and authorised to ensure clarity of understanding and ongoing *management of project finances* and the program budget overall

BSBPM604A/02 Manage Program Costs

- 2.1 *Cost management systems* are developed and maintained to direct monitoring of actual expenditure and to control costs throughout multiple project life cycles and for the program overall
- 2.2 Analysis is conducted, options are evaluated and responses to project cost variations are implemented to maintain control over changing financial and overall program objectives
- 2.3 Internal and external influences on program costs are monitored and, where necessary, approval is sought from business management for changes to the approved program budget

BSBPM604A/03 Direct Financial Completion

- 3.1 Direction is provided for project *finalisation activities* to achieve integrated financial and physical project completion within program and therefore client and organisational expectations
- 3.2 Project outcomes are reviewed from available *records* at the finalisation of each project, and information is analysed to determine the effectiveness of cost management systems
- 3.3 Program lessons learned are kept as a resource for future reference and, where necessary, referred to a higher project authority for application in planning strategic direction changes and business outcomes for future projects

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken for across multiple projects or a program for direction of cost management of the inherent projects and for management of the program budget including:
- Evidence of managing the work of project managers and those working within the projects' delivery environment.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

- application of lessons learned from previous project/s when authorising new projects entering the program
- cost estimates at cost element and summary levels
- cost management plans, strategies, analysis, forecasts and predictions
- cost breakdown structures
- financial feasibility studies
- consolidated program budgets and expenditure forecasts
- program cash flow profiles
- records of analysis of financial variance and trends, and remedial actions taken
- financial transition plans
- budget control mechanisms
- records of direction to project managers for clearance of project liabilities and disposal of project assets
- aggregated project finalisation reports with program conclusions and recommendations – records of cost management lessons learned
- financial audit documentation

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how resource requirements and associated costs were rationalised/levelled for the program
- how program budgets, cost strategies and cost management plans were updated, rationalised and reported
- how project managers were directed throughout projects with respect to the costs of projects
- how problems and issues with respect to costs arising during projects have been resolved
- how projects finalisation was reviewed for program update and reporting
- how projects have been reviewed with respect to cost management success criteria
- how improvements to cost management of projects have been used in future projects within the program

QUALIFICATION: *Advanced Diploma of Project Management*
AQF Level 6

WORKSHOP TITLE: *PM605 Developing a Project Methodology*

UNITS OF COMPETENCIES:

BSBPM602A Direct the Scope of Multiple
Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM602A Direct the Scope of Multiple Projects/Programs

BSBPM602A/01 Authorise Projects

- 1.1 *Needs* are analysed, in consultation with client and other stakeholders if necessary, to justify each project and for the designation of project managers
- 1.2 Project selection and prioritisation are conducted within guidelines provided by, or under direction of, a higher project (governance) authority
- 1.3 *Project authorisation recommendations* are made to a higher project authority as the basis for future projects management activity and commitment of resources and effort

BSBPM602A/02 Define and Plan Program Scope

- 2.1 Projects' objectives, major deliverables and resource requirements are defined at the project and program level, and are confirmed with the governance group or a higher project authority
- 2.2 Measurable projects' outcomes and benefits are determined and agreed to enable quantified evaluation of program performance
- 2.3 Scope definition, *scope management* strategies and plans are developed, agreed and communicated
- 2.4 Program scope is aligned to business requirements and organisational strategy

BSBPM602A/03 Manage Program Scope

- 3.1 Regular program reviews are conducted to measure *project performance* and to ensure that stated program and business/strategic objectives are met
- 3.2 *Change management system* is established and maintained to form the basis of ongoing scope management
- 3.3 The effects of potential, perceived and actual projects' scope changes are reviewed and action is taken to ensure that project and program objectives are achieved or modified
- 3.4 Projects' outcomes are compared against defined program scope and aligned strategic objectives
- 3.5 Results of program outcomes are communicated
- 3.6 Scope management lessons learned are passed on to a higher project authority and feedback is provided for application in planning and implementation of later projects within the program

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken for across multiple projects or a program for directing and authorising scoping of the projects including:
- Evidence of managing the work of project managers and other working within project teams.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing the program and directing projects such as:

- requirements definition and needs analysis documentation
- documentation aligning business directions to program and therefore multiple project objectives
- program charter/directive
- program manager's terms of reference
- program scope statement
- program definition terms of reference
- work breakdown, product breakdown and organisation breakdown structures
- project performance management records
- formal agreements, that is contract, sub-contract, memoranda of understanding
- records of management of change management system and procedures
- records of program scope lessons learned

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how project authorisations were managed
- how project scopes were defined in a program context and agreement gained between program manager and the business
- how expected program performance was determined
- how project managers were given direction throughout projects with respect to the scope of the projects
- how the need for scope changes within projects were identified and authorised
- how projects/programs were reviewed with respect to the scope of the projects
- how improvements to scope management of projects have been used in future projects

QUALIFICATION: *Advanced Diploma of Project Management*
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WORKSHOP TITLE: *PM601 Managing Project Benefits*

UNITS OF COMPETENCIES:

BSBPM601A Direct the Integration of Multiple
 Projects/Programs

BSBPM604A Direct Cost Management of Multiple
 Projects/Programs
(see PM604)

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM601A Direct the Integration of Multiple Project/Programs

BSBPM601A/01 Direct Integration of all Functions of Project Management

- 1.1 Project managers are supported in project stakeholder analysis to determine the influence of others on project outcomes
- 1.2 The requirements of all projects and the multiple inter-relationships of *project management functions* are analysed, rationalised and integrated to determine agreed, *achievable program objectives* that align to organisational goals, strategies and objectives as stated in strategic planning documentation
- 1.3 Project plans are reviewed, rationalised and, when approved, integrated into a structured, cohesive program plan for ongoing program management
- 1.4 Integrated program control mechanisms are derived from project plans to establish program control requirements
- 1.5 Project plans are used to develop consolidated program budgets, schedules and interdependencies, and to identify program risks

BSBPM601A/02 Direct the Internal Project Environment to Meet External Needs and Expectations

- 2.1 The *internal project working environment* is directed to ensure project managers' work is conducted effectively throughout multiple, aligned project life cycles
- 2.2 Links are established and maintained to direct the alignment between projects and organisation objectives within the program
- 2.3 Project proposals (scope definitions) are evaluated against the organisation's strategic objectives
- 2.4 Conflicting requirements of individual projects are coordinated and directed to achieve program objectives
- 2.5 Where necessary individual project objectives are modified to achieve overall program objectives
- 2.6 The impact of *external environmental influences* on individual projects is coordinated to achieve program objectives

BSBPM601A/03 Direct Projects throughout Project Life Cycles

- 3.1 All project managers are directed to provide project phases, approval points, review points and other milestones, to allow program integration
- 3.2 Project baselines are established and progress is reported in relation to baselines, to measure program performance throughout the business reporting cycle
- 3.3 Project baselines are reviewed progressively to ensure nominated benefits are consistent with organisational expectations
- 3.4 *Finalisation plans, procedures and activities* are directed to ensure final outcomes are met and that projects meet agreed program objectives
- 3.5 Projects finalised in a program management reporting period are reviewed to evaluate benefits to the business
- 3.6 Integration management lessons learned are passed to higher project authority and feedback is provided for application to other projects

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken for across multiple projects or a program for integrating all project management functions:
- Scope
- Time
- Cost
- Quality
- Human resources
- Communications
- Risk
- Procurement – within and between projects including:
- Evidence of directing the work of project managers and others in the internal and external environment.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing the program/directing projects such as:

- records of rationalisation/integration processes to determine achievable program objectives
- program plans and control mechanisms covering the coordination of multiple projects' outcomes
- maintenance of processes for linking and coordination of program control mechanisms
- records of organisation and other environmental impact analysis
- program (integrated) schedules and budgets
- records of coordination and tracking of multiple projects interdependencies and program resource levelling

- records of establishment, measurement and reporting of progress in relation to program baselines
- records of use of benefits identification, tracking and realisation tables
- program finalisation plans (aligned to organisational management periods, such as the financial year)
- lists of integration management lessons learned

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how program planning is coordinated through direction of projects
- how projects are monitored during the program life cycle
- how problems and conflicting requirements arising in the program are addressed and managed
- how multiple projects/ progress is measured throughout the program
- how projects are finalised in the context of a program management/reporting period
- how projects are reviewed and lessons learned are used in future projects within the program

QUALIFICATION: *Advanced Diploma of Project Management*
AQF Level 6

WORKSHOP TITLE: *CP01 Principles of Contract Management*
CP04 Tendering

UNITS OF COMPETENCIES:

BSBPM609A Direct Procurement and Contracts of
Multiple Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM609A Direct Procurement and Contracts of Multiple
Projects/Programs

BSBPM609A/01 Direct Planning for Project Contracting and Procurement

- 1.1 Product specifications and procurement requirements are directed for identification, analysis and prioritisation, in consultation with appropriate stakeholders, for procurement and contract planning
- 1.2 *Procurement strategies, methods and management plans* are directed for development for project objectives throughout the program

BSBPM609A/02 Direct Set Up of Contract and Procurement Process

- 2.1 Project managers are directed to source organisations that meet procurement requirements
- 2.2 Selection processes and selection criteria are established, in consultation with stakeholders, and communicated to prospective contractors
- 2.3 Contract and procurement actions accord with organisation and program objectives

BSBPM609A/03 Direct Management of Contract and Procurement Process

- 3.1 Direction is provided for requirements of *proposals*, and communicated to prospective contractors
- 3.2 Direction is provided for responses to be evaluated and preferred contractors to be selected in accordance with agreed selection processes
- 3.3 Contract terms and conditions are directed for negotiation between client and preferred contractor

BSBPM609A/04 Direct Management of Contracts

- 4.1 Contract and procurement activities are directed for management in accordance with program contract and procurement management guidelines
- 4.2 Direction is provided for regular reviews for available *records* and information, and variance is directed for analysis and changes are agreed for implementation
- 4.3 Project managers are direct to work within the legal and organisational framework for contracts

4.4 Potential, perceived and actual contractual conflicts are directed for identification and remedial actions are approved to minimise disruption

BSBPM609A/05 Direct Finalisation of Contracts

- 5.1 Finalisation activities are directed for management of contract deliverables in accordance with contractual and project and program requirements
- 5.2 Project outcomes are directed for review and analysis to determine the effectiveness of contract and procurement processes and procedures
- 5.3 Lessons learned are aggregated and used for application in planning and implementation of later projects within the program and, where appropriate, passed to organisational management for use in strategic planning

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken for across multiple projects or a program for direction of contract and procurement management including:
- Evidence of managing the work of others including project managers.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in directing the management of multiple projects and the program such as:

- records of product specifications
- aggregated/synthesised procurement management plans
- records of analysis, evaluation of options and procurement strategy development
- contractor identification, evaluation and selection records
- tendering documentation, evaluation criteria and selection processes
- contract negotiation documentation, for example contract negotiation strategies, plans and team and individual directives or working documents
- program impact records of project progress measurement and conflict resolution processes
- program records of development and management of multiple project contract change procedures
- program analysis of multiple project records of test and acceptance procedures
- program records of contract discharge procedures and documentation
- program records of procurement management lessons learned and application in other projects

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how procurement requirement were directed for identification and documentation for projects
- how procurement management plans were authorised for projects

- how project managers were managed throughout projects with respect to management of procurement within their projects
- how procurement was managed during multiple projects across the program
- how procurement problems and issues arising during multiple projects were addressed
- how contract finalisation activities were directed for management
- how contract and procurement management was reviewed in projects
- how improvements to contract procurement management have been used for future projects within the program

**QUALIFICATION: *Advanced Diploma of Project Management*
*AQF Level 6***

WORKSHOP TITLE: *FM02 Leadership in the Workplace*

UNITS OF COMPETENCIES:

BSBPM606A Direct Human Resources Management of Multiple Projects/Programs

ELEMENTS OF COMPETENCY AND PERFORMANCE CRITERIA:

BSBPM606A Direct Human Resources Management of Multiple Projects/Programs

BSBPM606A/01 Direct Human Resources Management and Responsibility Assignment

- 1.1 Human resource requirement analysis for projects is directed, to determine numbers and skills levels required for the overall program
- 1.2 Stakeholder assessment is directed to establish a basis for stakeholder management within projects and the overall program
- 1.3 Responsibility assignment is directed for projects' activities and tasks and authorisation protocols are established

BSBPM606A/02 Manage Program Organisation and Staffing

- 2.1 Resource requirements for projects are determined, in consultation with project managers and appropriate stakeholders, to establish program staffing levels, allocation to project and required competencies
- 2.2 *Project organisation and structure* is directed for development to optimise alignment of individual and group competencies within projects
- 2.3 *Staff* are recruited, allocated to project or reallocated within the organisation, within agreed delegated authority, to meet competency requirements throughout the program
- 2.4 *Human resources management (HRM) methods, techniques and tools* are directed to project managers, and modified for program requirements
- 2.5 Organisational HRM system and HRM processes are utilised across projects

BSBPM606A/03 Direct Project Staff Performance Management

- 3.1 Performance measurement criteria are agreed for clarity of roles and responsibilities and ongoing assessment
- 3.2 Systems for ongoing *development and training* of personnel across the program are established and implemented by project managers
- 3.3 Individuals' performance is measured against agreed criteria and actions are authorised to overcome shortfalls in performance and encourage career progression

BSBPM606A/04 Lead Teams

- 4.1 A system of continuous improvement of staff is managed to enhance program effectiveness
- 4.2 Individual and team performance and morale levels are analysed and action is taken where necessary
- 4.3 Procedures for interpersonal communication, counselling and conflict resolution are directed to project managers and results are reviewed to maintain and promote a positive working environment
- 4.4 Intra-organisational and intra-project conflict is identified and positively managed to maximise achievement of program objectives
- 4.5 HRM lessons learned are aggregated for application in planning and later projects in the program and, where appropriate, passed to others for consideration in strategic planning and direction

EVIDENCE MUST BE PROVIDED OF:

- Responsibility taken for across multiple projects or a program for human resources management of the projects including:
- Managing the work of others including project managers and
- Those external to the program and / or organisation who contribute to, or benefit from, the outcomes of the projects.

PRODUCTS THAT COULD BE USED AS EVIDENCE INCLUDE:

Documentation produced in managing the program such as:

- current and future requirements for competency within the program
- staffing levels and competencies related to projects
- job descriptions, including measures of performance
- program organisation charts
- staff recruitment and selection criteria
- teams and individual responsibilities, levels of authority and performance assessment criteria
- high-level program responsibility assignment matrix
- master stakeholder management plan
- HRM system, including performance measurement and reporting, and conflict resolutions procedures
- HRM plans, including training and development plans
- records of analysis of internal and external influences on HRM performance
- HRM lessons learned

PROCESSES THAT COULD BE USED AS EVIDENCE INCLUDE:

- how human resources requirements were authorised for projects
- how required human resources were allocated to and/or selected for projects

- how project managers were managed throughout the program with respect to human resources management
- how responsibility assignment was directed, managed and authorised
- how human resources management was directed throughout the program including required training and development
- how stakeholders were managed and their expectations tracked and met
- how problems and issues with respect to human resources arising during projects were communicated to the program level and resolved
- how projects outcomes were reviewed with respect to human resources management
- how improvements to project human resources management have been/will be used in future projects within the program

EVIDENCE CHECKLIST

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

- BSBPM601A Direct the Integration of Multiple Projects/Programs
- BSBPM602A Direct the Scope of Multiple Project/Programs
- BSBPM603A Direct Time Management of Multiple Projects/Programs
- BSBPM604A Direct Cost Management of Multiple Projects/Programs
- BSBPM605A Direct Quality Management of Multiple Projects/Programs
- BSBPM606A Direct Human Resources Management of Multiple Projects/Programs
- BSBPM607A Direct Communications Management of Multiple Projects/Programs
- BSBPM608A Direct Risk Management of Multiple Projects/Programs
- BSBPM609A Direct Procurement and Contracts of Multiple Projects/Programs