Manage and implement small projects

D1.HGE.CL7.04
D1.HGA.CL6.11

Assessor Manual

Australian Aid
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William Angliss Institute
Specialist centre for foods, tourism & hospitality

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Assessor Manual

Project Base

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

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Competency Based Assessment (CBA) – An introduction for assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested assessment methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative assessment methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Log books

- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of assessment methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of practice for assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary

- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes
- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal
- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and checklist for assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

	Tick (✓)	Remarks
Prior to the assessment I have:		
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		

	Tick (✓)	Remarks
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for recording competency

Specifications for recording competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for different assessment methods

Specifications for work project assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected

- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place
- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:

    a) Using the 'X' method of assessment

    b) At 'X' location

    c) You will have 'X time period' for this assessment
  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name

  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment
- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

  We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"
- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

We have X time for this assessment:

- The due date for completion of this assessment is X
- On this date you must forward the completed questions to the assessor by X time on the date of X
- Do you have any questions about this assessment?"

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date
- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

UNIT TITLE: MANAGE AND IMPLEMENT SMALL PROJECTS		**NOMINAL HOURS:** 100
UNIT NUMBER: D1.HGE.CL7.04 D1.HGA.CL6.11		
UNIT DESCRIPTOR: This unit deals with the skills and knowledge required to manage and implement small projects in a range of settings within the hotel industries.		
ELEMENTS AND PERFORMANCE CRITERIA	**UNIT VARIABLE AND ASSESSMENT GUIDE**	
Element 1. Plan project **1.1** Develop the objectives and scope of the *project* in consultation with appropriate colleagues and customers **1.2** Determine and develop a *resource strategy* for the project **1.3** Evaluate the *financial viability* of the project through analysis of *key factors* **1.4** Plan and create an *administrative structure* for the project **1.5** Allocate project responsibilities in agreement with others, and clearly communicate responsibilities to all involved **1.6** Plan internal and external communications, and *public relations and marketing strategies* together with appropriate colleagues	**Unit Variables** The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment This unit applies to all industry sectors that manage and implement small projects within the labour divisions of the hotel and travel industries and may include: 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production *Project* may relate to: • Conferences and meetings • Promotional or other events • Introduction of new technology or systems • Product development	

1.7 Reach agreement on suitable project *evaluation methods* **1.8** Develop an overall *project management plan* and communicate plan to appropriate colleagues **1.9** Identify *key project milestones* and communicate these to persons involved **Element 2. Administer and monitor project** **2.1** Implement and monitor project in conjunction with project team members **2.2** Provide support and assistance to team members, as required **2.3** Build trust and respect within the project team **2.4** Assess and review progress against *project goals* and in consultation with project team members **2.5** Determine the need for additional project *resources* and take action accordingly **2.6** Monitor budget in accordance with enterprise guidelines **2.7** Provide regular *reports* on project progress to all appropriate colleagues/customers **2.8** Complete the project within agreed time lines **Element 3. Evaluate project** **3.1** Assess project at specified stages, using agreed evaluation methods	• Research projects • Ongoing business projects. Resource strategy may relate to: • Human resources strategy with reference to permanent/part-time employees, contractors • Material resources strategy, e.g. Supplier contracts, discounts, volume pricing • Physical resources strategy, e.g. Purchase, lease, rental • Framework for development, maintenance and utilisation of resources. *Financial viability* of the project may relate to: • Availability of short and long-term funding • Cash flow issues • Market feasibility • Level of financial risk involved • Cost benefit analysis • Impact on other aspects of operation • Breakeven points/profitability. *Key factors* may relate to: • Available resources • Capability of resources • Budget • Contractual obligations • Contractual penalties.

3.2 Take account of agreed goals and priorities when carrying out a *project evaluation* **3.3** Involve project team members, appropriate colleagues and customers in the project evaluation **3.4** Incorporate evaluation results into ongoing project management **3.5** Share information from project evaluation with appropriate colleagues and incorporate information into future planning **3.6** Report on project	*Administrative structure* for the project may relate to: • Management • Secretariat • Consultants • Contractors and suppliers • Steering committee • Advisory and reference groups • Consultative groups. *Public relations and marketing strategies* may relate to: • Providing advice and information to clients, funding bodies and stakeholders • Developing and publishing reports • Developing and distributing brochures, fliers and other marketing materials • Communicating to public and stakeholders via mass media. *Evaluation methods* may include: • Surveys and questionnaires • Pilots and trials • Analysis of data. *Project management plan* may include: • Goals and outcomes • Selection or tendering process • Personnel • Budget

	• Stages • Timeframes • Key milestones • Internal and external communication processes and channels • Sponsors • Risk management and contingency plans • Quality assurance • Consultation strategies • Reporting requirements • Marketing. *Key project milestones* may relate to: • Stages • Outcomes • Reporting requirements. *Project goals* may relate to: • Deliverables • Budget • Quality • Customer satisfaction • Efficient use of resources. *Resources* may include: • Physical resources • Human resources.

	Reports may relate to: • Deliverables • Budget • Quality • Customer satisfaction • Efficient use of resources • Progress of project • Verbal • Formal written. *Project evaluation* may relate to: • Deliverables • Budget • Quality • Customer satisfaction • Efficient use of resources. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Project management processes, the project life cycle and the relationship between project stages • In-depth knowledge of nature of the project being managed, including internal and external issues to be considered • Planning and control procedures, resource management and risk management • Demonstrated ability to apply leadership and management skills within a project environment.

	Linkages To Other Units • Develop and implement operational plans • Lead and manage people • Manage financial performance within a budget • Work effectively with colleagues and customers • Manage and resolve conflict situations. **Critical Aspects of Assessment** Evidence of the following is essential: • Demonstrated ability to effectively manage and implement projects, including evidence of skills in planning, administration, financial management and leadership • Demonstrated ability to apply understanding of the critical aspects of effective project management. **Context of Assessment** This unit may be assessed on or off the job • Assessment must require the candidate to lead a project team • Assessment should include practical demonstration of the management and implementation of a small project in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge • Assessment must include project or work activities that allow the candidate to respond to multiple and varying project demands relevant to work area, job role and area of responsibility that allow the candidate to manage a multi-faceted or complex industry-based project within a specified and realistic timeframe that reflects industry practice.

	Resource Implications Training and assessment to include access to a team and realistic project in a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools, computer equipment and relevant software. **Assessment Methods** The following methods may be used to assess competency for this unit: • Case studies • Observation of practical candidate performance • Oral and written questions • Portfolio evidence • Problem solving • Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

Key Competencies	**Level**	**Examples**
Collecting, organising and analysing information	2	Research information related to the project; research and compare costs, products and services
Communicating ideas and information	2	Provide instructions and advice to participants and consultants; write reports and related documents

	Planning and organising activities	2	Plan the project and budgets; organise stakeholders and participants; establish and allocate roles and responsibilities
	Working with others and in teams	2	Work with other team members, stakeholders, consultants, government and funding bodies; provide leadership to consultants and others
	Using mathematical ideas and techniques	2	Cost out projects; develop budgets; keep financial records of project income and expenditure
	Solving problems	1	Deal with problems such as costs exceeding budgets, failure of people to meet timelines, poor quality outcomes, key people dropping out, illness of consultants, difficulties in enlisting participants in consultation, technical problems
	Using technology	1	Use computer software to facilitate management of project(s)

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Manage and implement small projects D1.HGE.CL7.04 D1.HGA.CL6.11
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. What might you do to develop the objectives and scope of a project?	❑	❑
2. What is a resource strategy for a project and what details does it contain?	❑	❑

Questions	Response	
	PC	NYC
3. What would you consider when determining the viability of a small project?	❑	❑
4. Describe an administrative structure you might create for a small project.	❑	❑
5. Why is it important to allocate project responsibilities to others, how might you do this and what would you take into account before assigning responsibilities to individuals or teams?	❑	❑

Questions	Response	
	PC	NYC
6. Explain what might be involved in a communication, PR and marketing strategy for a small project.	❑	❑
7. How might you reach agreement on the methods to be used to evaluate a project and why is it important to do this?	❑	❑
8. What is the role of a project management plan and what details does it contain?	❑	❑

Questions	Response	
	PC	NYC
9. Give me two examples of 'key project milestones' and explain why it is important to establish key project milestones for a small project.	❑	❑
10. Identify the roles for people who may be involved in a small project as part of the project team.	❑	❑
11. What might you, as a small project manager, do to provide support and assistance to project team members?	❑	❑

Questions	Response	
	PC	NYC
12. What can you do, as a small project manager, to build trust and respect with the project team?	❑	❑
13. Tell me what you might do to check progress of a small project against project goals.	❑	❑
14. Give me an example of what you might need to provide in the way of ‘extra resources’ for a small project explaining what you might do to secure those resources.	❑	❑

Questions	Response	
	PC	NYC
15. What activities are involved in monitoring the budget for a small project?	❑	❑
16. Why are regular reports on the progress of small projects required and how and when are these generated?	❑	❑
17. Why is it important to complete a small project within agreed timelines and what can you do to ensure this occurs?	❑	❑

Questions	Response	
	PC	NYC
18. What is involved in assessing a small project at specified stages and how may this be done?	❑	❑
19. Explain the role of agreed goals and priorities for a small project when carrying out a project evaluation.	❑	❑
20. Describe the role, and importance, of project team members in evaluating a small project.	❑	❑

Questions	Response	
	PC	NYC
21. Tell me why it is important to integrate the findings of small project evaluations into ongoing future project management.	❑	❑
22. How might you share project evaluation findings with 'relevant others' and why is it useful to do this?	❑	❑
23. Why might a formal report be required following finalisation of a small project and what might this report contain?	❑	❑

Written Questions

Manage and implement small projects – D1.HGE.CL7.04 D1.HGA.CL6.11

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. What are the central activities involved in project management?

2. What information is contained in a ‘Project Scope Statement’?

3. What is the role of a ‘resource strategy’?

4. What are the three classifications of resources for which a resources strategy may be prepared?

5. Identify five issues which may need to be considered when determining financial viability of a project.

6. List five benefits of planning an administrative structure for a project.

7. Give three reasons why it is important to include a management representative in the administrative structure for a project.

8. List three examples of project-related tasks a 'Secretariat' would undertake.

9. Identify five factors which combine as a basis for allocating project responsibilities.

10. Name three ways you may effectively communicate project-related responsibilities to others.

11. Identify five points which need to be determined when planning **internal** communication for a project.

12. Name five possible targets for **external** communication in relation to a project.

13. Define 'public relations' identifying its intention and explaining the role of a PR strategy.

14. List three examples of activities you may be required to engage in when planning a marketing strategy for a project.

15. List five topics about which agreement should be obtained in relation to project-related evaluation.

16. Give three examples of effective evaluation techniques for small projects.

17. Give five reasons for creating a ‘project management plan’ for a project.

18. Identify ten elements which should be included in a project management plan.

19. What are the three steps which comprise the risk management process?

20. In your own words describe what is meant by a project ‘milestone’.

21. Give three examples of 'standard practice' at the outset of a project in relation to implementing and monitoring the project.

22. List three requirements which underpin effective project management in terms of implementing and monitoring project management plans.

23. Identify five reasons a PM needs to provide support and assistance to project team members.

24. List five generic examples of support and assistance a PM could provide to project team members.

25. Describe five ways to build trust and respect with project team/s.

26. List three reasons you need to assess and review project progress.

27. What are listed in the notes as the “two broad focuses for assessment and review of a project”?

28. List three options for more obtaining additional financial resources or extra benefit from limited funding for a project.

29. Name three topics to which enterprise guidelines may apply regarding the monitoring of project budgets.

30. List three generic activities which may be involved in monitoring financial activities against budget.

31. Give three points which illustrate the role of project reports.

32. List ten possible actions you could take to help complete a project on time.

33. What is identified as the key whenever you are faced with a situation where remedial or other action needs to be taken in relation to a project?

34. On what two bases should projects be assessed?

35. Identify five opportunities for ongoing assessment of a project.

36. Give five reasons a project should be assessed and reviewed when it has been completed.

37. Give five examples of topics which might be addressed when assessing and reviewing a completed project.

38. Provide a list of five stakeholders who may be involved in the review process for a project.

39. The evaluation process for a project must consider 'process' and 'products': what is meant by each of these terms?

40. Identify three practical considerations which relate to incorporating project evaluation results into ongoing project management.

41. List the activities involved in documenting lessons learned from the formal assessment/review and evaluation process following completion of a project.

42. List three actions you can take to help optimise inclusion of lessons learned from past projects into future projects.

43. Identify ten points commonly addressed in relation to contents of Project Reports.

Answers to Written Questions

Manage and implement small projects – D1.HGE.CL7.04 D1.HGA.CL6.11

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. What are the central activities involved in project management?

- Planning and preparation
- Organising and arranging
- Resource identification and acquisition
- Project implementation and administration
- Monitoring activities – before and during the project
- Project evaluation and review.

2. What information is contained in a 'Project Scope Statement'?

- Justification for the project
- Project deliverables
- Name of client/funding body
- Objectives
- Risks
- Project management.

3. What is the role of a 'resource strategy'?

A resource strategy is a plan on how you intend achieving one or more of the following (depending on the project, and the type of resource being considered):

- Obtaining the necessary resources required to undertake the project you are managing
- Developing the resources to ensure they allow you to achieve the objectives of the project and comply with applicable requirements and/or constraints
- Maintaining the resources so they remain effective and efficient and their useful life is extended
- Using and managing resources for optimal outcomes.

4. What are the three classifications of resources for which a resources strategy may be prepared?

- Human resources
- Physical resources
- Financial resources.

5. Identify five issues which may need to be considered when determining financial viability of a project.

- The availability of short and/or long-term funding for the project
- The cost of borrowing funds to enable the project to be implemented
- Internal cash flow situation of the venue
- Market feasibility
- Level of financial risk involved
- The results of relevant cost-benefit analyses
- The impact of the project on other aspects of the business.

6. List five benefits of planning an administrative structure for a project.

- A committed and dedicated source of support and advice
- A sounding board for your thoughts and proposals
- Ready access to assistance
- An established body of people to whom tasks and responsibilities may be delegated
- A formal reporting framework
- A hierarchical structure for decision making
- The ability to allocate project-related responsibilities and tasks to nominated persons or bodies.

7. Give three reasons why it is important to include a management representative in the administrative structure for a project.

So they can:

- Gain first-hand experience of the management of the project and your activities in managing it
- Promptly authorise action which needs to be taken outside your specified scope of authority
- Provide extra information and insight to the project as the need for them to do so arises
- Use their authority to influence others – both within the organisation and external to it.

8. List three examples of project-related tasks a 'Secretariat' would undertake.

Administrative support for the project such as:

- General office work
- Typing – letters, reports, emails, requests for quotations, RFTs, RFPs, agendas for meetings, minutes of meetings
- Filing

- Photocopying
- Making telephone calls
- Scheduling meetings, notifying people of meetings, distributing required information prior to meetings, preparing rooms/venues for meetings and taking minutes of meetings
- Maintaining documentation
- Facilitating communications
- Processing payments and paperwork.

9. Identify five factors which combine as a basis for allocating project responsibilities.

- The composition of your administrative structure – and the expertise and experience which is available from this source
- The people who comprise your project team/s
- The plans and strategies which have been developed for the specific project
- Known strengths and weaknesses of those available to you
- Staff who have indicated to you they wish to be involved
- Direction given to you by super-ordinates
- Your objective of developing a certain staff member to take over your position (in terms of succession planning) when you move on, or to increase the capacity for small project management within the business by multi-skilling staff who may become PMs in their own right or may serve as your deputy/assistant
- Requests from delegating bodies, clients or funding bodies that certain people within the organisation are included in the project to undertake specified roles.

10. Name three ways you may effectively communicate project-related responsibilities to others.

- Scheduled, one on one, face to face exchanges which is arguably the best method to use but it very time-consuming
- Scheduled, group meetings which save time but may stifle discussion of points which need to be discussed
- Telephone communication
- Email
- Memoranda.

11. Identify five points which need to be determined when planning internal communication for a project.

- How communication will occur
- Frequency of communication
- Dates for reports to be published
- Topics for communication

- Communication protocols
- Formats for written communication
- Filing requirements for all communications
- Development of internal Distribution List.

12. Name five possible targets for external communication in relation to a project.

- Nominated stakeholders as identified on the Distribution List
- Government agencies/authorities
- The media
- Nominated target markets as a whole, or specific (high-value/VIP customers) from within each target market
- Local residents/the local neighbourhood
- Suppliers and providers
- Consultants for the project
- Contractors engaged for the project.

13. Define 'public relations' identifying its intention and explaining the role of a PR strategy.

Public relations is the relationship that exists between the venue and its different 'publics': these publics may be the media, government authorities, suppliers, local neighbourhood community and all the different target markets the venue has.

The intention is to generate good public perceptions of the venue and for the project.

The PR strategy will identify how you intend achieving the goals you have set for PR in relation to the project.

14. List three examples of activities you may be required to engage in when planning a marketing strategy for a project.

- Generate information packs to be sent to stakeholders/nominated persons
- Create the content for brochures and other promotional materials
- Generate a database of those to whom information needs to be communicated
- Determining locations and frequency/schedule of paid advertisements and other unpaid promotional activities
- Confirm your marketing activities integrate with other marketing activities being undertaken by the venue
- Verify implementation of the marketing strategy will achieve the goals set for the strategy.

15. List five topics about which agreement should be obtained in relation to project-related evaluation.

- Timing of the evaluation – when it is to take place
- Evaluation methods to be used – see below
- Criteria for evaluation – identifying what the project will be evaluated against: this should focus on the objectives and goals contained in the project management plan
- Questions to be answered – this identifies specific questions which may be part of, or additional to, the goals and objectives for the project
- Evaluation team members – identifying who will be involved in the evaluation process
- Reports (if any) to be generated – outlining the contents to be addressed
- Distribution List – for sharing/communication results/outcomes and 'lessons learned' as identified by the evaluation.

16. Give three examples of effective evaluation techniques for small projects.

- Conducting surveys
- Applying questionnaires to nominated people
- Workplace observation relating to project implementation
- Engaging in pilots for aspects of the project
- Capturing and analysing *quantitative* workplace data and *qualitative* data.

17. Give five reasons for creating a 'project management plan' for a project.

- Help avoid confusion about the work to be done
- Provide 'authority and legitimacy' to the project
- Guard against project creep
- Produces the basis for effective and efficient project execution
- Set priorities for the work to be done
- Obviate the need to rework things once project work has actually commenced
- Indicate the way in which there is a need for cooperation and interdependency between, for example, people and departments involved in the project
- Avoid unnecessary duplication of activities, effort and expenses
- Put all project staff 'on the same' page about what needs to be done
- Provide an essential document to use for monitoring, review and evaluation purposes
- Provide a vital communication tool for stakeholders in relation to the project
- Facilitate risk planning and management

- Prescribe outcomes that can be used as the basis for guiding decision making throughout the project
- Optimise the likelihood everything that should be thought about and considered regarding the project is, in fact, identified and given the necessary attention.

18. Identify ten elements which should be included in a project management plan.

- Name/title of the project
- Name of the person/s who prepared the project management plan
- Start and finish dates
- Identified stages of the project
- Major stakeholders
- Risk identification
- Milestone information and dates
- Resources for the project
- Limitations and constraints applicable to the project
- Key Performance Indicators
- Allocation of responsibilities to specific person/s for nominated action/s as identified within the Plan and its Stages
- Budget
- Reporting requirements
- Consultations strategies
- QA requirements
- Internal and external communication for the project
- Details of any tendering or selection process required
- Details relating to evaluation of the project.

19. What are the three steps which comprise the risk management process?

- Identify risks
- Analyse/evaluate risks – also known as risk appraisal
- Control the risks.

20. In your own words describe what is meant by a project 'milestone'.

Answer must address:

- Milestones are points in time when nominated activities are expected to be completed, or times when important decisions need to be taken about subsequent action/work
- Milestones occur at significant points in the project such as the end of a stage (or combination of stages) for a project
- They can be seen as project checkpoints or benchmarks

- There is no standard timeline for the setting of milestones. The key factor in determining when and where they occur are an estimation of the time required to achieve completion of the work which has to be undertaken.

21. Give three examples of 'standard practice' at the outset of a project in relation to implementing and monitoring the project.

- Verify all requirements for project start have been met. You would for instance require:
  - Copies of relevant authorizations which have been signed-off
  - Direct approval from the manager/owner to proceed
- Look at your own workload for the project period and take appropriate action to ensure you can commit the required time to the project, which may involve Prioritising work, Delegating work, Creating a personal work schedule, Diarising time you have committed to/for the project
- Meet with the client to enquire if they have any final requirements additional to what is already known
- Communicate with other supervisors and managers to advise them of the project and the fact it is about to start
- Convene a meeting of your staff and team/s to brief them on the project and its commencement
- Advise staff and project teams the project has been officially approved and notify them of any last-minute changes made
- Identify any other workplace projects or activities which the project can – or should – be integrated with to achieve savings and other efficiencies.

22. List three requirements which underpin effective project management in terms of implementing and monitoring project management plans.

- Attention to project management
- You are a constant physical presence
- Facilitation of the work of others involved in the project
- Engagement with the project
- Constant monitoring of the project
- Attendance at all project meetings
- Ability to foresee potential problems
- Constant note-taking
- High levels of time management
- Taking of remedial action as required.

23. Identify five reasons a PM needs to provide support and assistance to project team members.

- Enable successful outcomes of project deliverables as approved by stakeholders and as identified in the project management plan and scope
- Demonstrate your commitment to the team members and the project and your commitment to the project
- Show the respect you have for team members and the role they play in delivering the project
- Maintain enthusiasm of team members towards the project
- Enable prompt advice and direction to be given where and when necessary
- A vital element of the support a PM can provide for a project/to project team members is to maintain personal enthusiasm for the project
- Prove to management of the venue you are delivering appropriate management, supervision and oversight of the project.

24. List five generic examples of support and assistance a PM could provide to project team members.

- Conducting a Project Induction
- Actually providing the resources identified in the project plan and identified in the project induction
- Provision of necessary/promised training and development for team members
- Providing necessary, requested and/or promised project oversight
- Scheduling and/or conducting regular project team meetings
- Providing initial motivation to team members
- Giving time to the team
- Maintaining enthusiasm for the project.

25. Describe five ways to build trust and respect with project team/s.

- Doing more yourself than you expect them to do
- Avoid micro-managing them
- Value each member of the team
- Get to know the people in the team
- Use their names when talking to them
- Communicate with all of them on a regular basis
- Provide and encourage constructive feedback
- Give them responsibility
- Celebrate the individuality of your team members. Diversity can be a cornerstone of success
- Pitch in and do some hands-on work yourself to contribute to the project

- Congratulate them regularly but make sure the congratulations are 'earned' and legitimate
- If they make a mistake, do not lecture them. Instead take a constructive approach
- Encourage their input, opinions and feedback
- Spend some time with them in a social context
- Never play favourites
- Address issues and problems promptly
- Advise your manager about the good work done by your team and/or individual members of the team and make sure you never take credit for the work of others.

26. List three reasons you need to assess and review project progress.

- Compare actual progress against expected/anticipated progress
- Provide a basis for taking remedial or corrective action where the analysis shows a lack of progress against plans
- Enable accurate and honest feedback and reports to be given on the project
- Give your project team necessary feedback
- Allow you to integrate other work/projects with your existing workload.

27. What are listed in the notes as the "two broad focuses for assessment and review of a project"?

- The project management plan
- Issues arising.

28. List three options for more obtaining additional financial resources or extra benefit from limited funding for a project.

- Moving money from another budget to the project budget if permitted
- Seeking additional money on the basis of new requirements not previously identified when initial funding was applied for
- Seeking reimbursement from clients for monies spent on their behalf for goods and services not agreed to as part of initial project agreements
- Ensuring deposits and progress payments are being received as expected from the client/funding body
- Reducing the quality and/or quantity of some aspects of the project to save money
- Making sure all items which can be sold to generate revenue are indeed sols and just disposed of
- Sourcing different providers who can supply the same, or similar, goods and services at a lower price
- Using different acquisition options instead of buying an item you may be able to better use your limited finance by hiring/renting items
- Sharing the cost of items with other venues in the same organisation as you, or with other departments within the same venue.

29. Name three topics to which enterprise guidelines may apply regarding the monitoring of project budgets.

- Format of budgets used
- Training required before you are authorised to access and monitor any venue budgets
- Identification of budget types
- Frequency of budget monitoring
- Supporting documents.

30. List three generic activities which may be involved in monitoring financial activities against budget.

- Check actual income and expenditure against budgets at regular intervals
- Include financial commitments in all documentation to ensure accurate monitoring
- Identify and report deviations according to organisation policy and significance of deviation
- Investigate appropriate options for more effective management of deviations
- Advise appropriate colleagues of budget status in relation to targets, within agreed timeframes.

31. Give three points which illustrate the role of project reports.

- Enable communication with stakeholders regarding progress of the project – including identification of issues arising, delays and their cause, and foreseeable problems.
- Help you demonstrate openness, due diligence, accountability, honesty, transparency and general management practices applied to the project
- May be a term of the contract for a project that exists with, for example, a funding agency/authority
- Provide hard copy information for future reference
- Allow the PM to talk to the stakeholders.

32. List ten possible actions you could take to help complete a project on time.

- Conduct appropriate start-up activities
- Schedule the provision of all identified/necessary resources
- Manage the procurement of resources
- Check, validate and/or authorise all project-related documentation
- Monitor progress of the project against the project management plan on a regular/daily basis
- Do more yourself
- Ask others to do more
- Adjust plans as required

- Conduct regular meetings with stakeholders
- Report on the project
- Maintain the project team
- Negotiate an extension of the deadline
- Change roles and responsibilities within project team members
- Outsource aspects of the project
- Reduce costs on materials or physical resources Seek more money for labour from management
- Research and apply more efficient methods for completing project tasks.

33. What is identified as the key whenever you are faced with a situation where remedial or other action needs to be taken in relation to a project?

Communication.

34. On what two bases should projects be assessed?

- On an ongoing basis – throughout the life of the project
- At the end of the project – when the project has been completed.

35. Identify five opportunities for ongoing assessment of a project.

- Daily briefing sessions with the project team undertaken at the start of each day
- Daily de-briefing sessions which is an ideal time to discuss progress or problems identified during the day/shift
- Scheduled project team meetings
- Specially-convened project review and evaluation meetings
- When complaints about the project are received
- When significant problems with the project arise/are identified
- When key providers/contractors indicate they are unable to perform their project obligations as agreed
- When the client requests changes to the agreed requirements for the project.

36. Give five reasons a project should be assessed and reviewed when it has been completed.

- Confirm project status. You need to verify the projected is truly completed/signed off, or whether there are still ongoing issues which still need to be resolved
- Learn lessons which could be used for future projects so the next project does not repeat any mistakes of this project
- Review activities, issues and problems relating to the project to identify what these were and, more importantly, why they occurred
- Learn about how the venue and staff performed. Project reviews can provide useful insight into venue culture, general staff morale and individual staff performance

- Discharge 'due diligence' requirements
- Determine follow-up action which may need to be taken to put the finishing touches to a project and/or take remedial/corrective action to fix project-related problems
- Provide useful, relevant and sought-after feedback to venue staff/teams who were involved in the project. Commonly those involved in a project also want to know how they performed
- Identify actions taken by anyone in the project that functioned to impede the project such as, for example, instances where failure to complete a task caused the delay of another task, or sub-standard performance by a contractor
- Provide detail and information to be used in formal reporting requirements for the project. Reports can use information obtained as part of the review process
- Formally complete/finalise the project management plan by fulfilling what is usually the last step/stage listed in the plan ('Project evaluation/review').

37. Give five examples of topics which might be addressed when assessing and reviewing a completed project.

- Funding levels and sources
- Resources use and allocation
- Timing issues
- Personnel used
- Role of stakeholders
- Problems encountered
- Evaluation of the project against the project management plan
- Budget
- Lessons learned.

38. Provide a list of five stakeholders who may be involved in the review process for a project.

- Management
- Steering Committee
- Project team members where a team (or similar) was developed to manage and/or discharge the requirements of the project
- Representatives from external professional organisations/bodies – accountants, legal advisers, government agencies
- Staff/team members involved in implementing/executing the project
- Staff/team members on whom the project impacted but who were not involved in its execution
- Internal venue 'support staff' such as bookkeepers, store personnel, anyone whose work was associated with assisting in the organisation/execution of the project
- Customers and guests on whom the execution of the project impacted and on whom any 'finished product' (new facilities, revised menus, refurbished rooms) impacts.

39. The evaluation process for a project must consider 'process' and 'products': what is meant by each of these terms?

- Processes – that is, the actions taken to achieve the outcomes/project deliverables
- Products – the end result of action taken: the outcomes/project deliverables as they exist at the point the evaluation is being undertaken.

40. Identify three practical considerations which relate to incorporating project evaluation results into ongoing project management.

- Rarely need to make significant/major changes to your project management plan.
- May need to source additional resources to enable completion of the project
- May need to adjust certain aspects of the project plan such as staffing, timelines, resources, responsibilities, providers, KPIs, Stages, milestones, quality criteria
- Should communicate to stakeholders:
  - The findings of the progressive evaluations advising them of all relevant points, the positive and the negative
  - Explaining reasons for required changes and explaining the causal factors
- Will need to seek approval for changes you intend making for the agreed/original project management plan
- Must distribute the revised project management plan to those who received a copy of the original project plan and there may be a need to hold a meeting to present/explain the revised plan.

41. List the activities involved in documenting lessons learned from the formal assessment/review and evaluation process following completion of a project.

- Writing down the lessons learned describing the situation that gave rise to the lesson, and what the exact nature of the lesson is (that is, how subsequent projects should take into account the lessons learned)
- Attaching supporting/accompanying documentation to the lesson such as (as appropriate) written feedback from stakeholders, sections of legislation, copies of quotes, invoices, product samples or letters of complaint
- Including basic data – name of the project, details of project team/management team, date/s, and base project documents used in the project (such as the project management plan)
- Communicating the lessons learned
- Filing the documents and data
- Standard filing protocols should apply.

42. List three actions you can take to help optimise inclusion of lessons learned from past projects into future projects.

- Circulate lessons learned to other PMs within the venue and meet to discuss
- Integrate lessons learned into venue training for project managers
- Revise venue policies and procedures to include the lessons learned

- Hold special staff-management meetings to discuss the lessons learned
- Provide SOP for project managers which makes it mandatory for them to:
  - Talk to previous PMs before they start planning a project
  - Read/review evaluations (‘lessons learned’) from previous projects.

43. Identify ten points commonly addressed in relation to contents of Project Reports.

- Name/title of the Report – ‘Review and upgrade of in-house training’
- Name of the venue
- Name of the Project
- Name of the person/s who prepared the Report
- The date/period to which the Report applies
- Identification of nature of the Report – for example, ‘First Interim Report’, ‘Final Report’
- Executive Summary – a single page synthesising the content of the report
- KPIs, milestones and stages the project management plan identified as being applicable in relation to *this* Report
- Actual progress matched against the stated criteria – identifying reasons for above and/or below expected outcomes
- Budget
- Your observations as PM.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Manage and implement small projects D1.HGE.CL7.04 D1.HGA.CL6.11
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Plan project b) Administer and monitor project c) Evaluate project 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Plan project		
Develop the objectives and scope of the project in consultation with appropriate colleagues and customers	❑	❑
Determine and develop a resource strategy for the project	❑	❑
Evaluate the financial viability of the project through analysis of key factors	❑	❑
Plan and create an administrative structure for the project	❑	❑
Allocate project responsibilities in agreement with others, and clearly communicate responsibilities to all involved	❑	❑
Plan internal and external communications, and public relations and marketing strategies together with appropriate colleagues	❑	❑
Reach agreement on suitable project evaluation methods	❑	❑

Did the candidate	Yes	No
Develop an overall project management plan and communicate plan to appropriate colleagues	❑	❑
Identify key project milestones and communicate these to persons involved	❑	❑
Element 2: Administer and monitor project		
Implement and monitor project in conjunction with project team members	❑	❑
Provide support and assistance to team members, as required	❑	❑
Build trust and respect within the project team	❑	❑
Assess and review progress against project goals and in consultation with project team members	❑	❑
Determine the need for additional project resources and take action accordingly	❑	❑
Monitor budget in accordance with enterprise guidelines	❑	❑
Provide regular reports on project progress to all appropriate colleagues/customers	❑	❑
Complete the project within agreed time lines	❑	❑
Element 3: Evaluate project		
Assess project at specified stages, using agreed evaluation methods	❑	❑
Take account of agreed goals and priorities when carrying out a project evaluation	❑	❑
Involve project team members, appropriate colleagues and customers in the project evaluation	❑	❑
Incorporate evaluation results into ongoing project management	❑	❑
Share information from project evaluation with appropriate colleagues and incorporate information into future planning	❑	❑
Report on project	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Manage and implement small projects D1.HGE.CL7.04 D1.HGA.CL6.11		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Develops project scope and objectives and identifies key milestones	❑	❑	❑
Creates resources strategy, administrative structure, communication strategy, PR strategy, marketing strategy and project management plan	❑	❑	❑
Evaluates financial viability	❑	❑	❑
Allocates responsibilities	❑	❑	❑
Implements and monitors plans providing assistance as required	❑	❑	❑
Assesses and reviews progress responding as required	❑	❑	❑
Monitors budget	❑	❑	❑
Provides progress reports and completes project on time/as required	❑	❑	❑
Evaluates and assesses project	❑	❑	❑
Reports on project outcomes sharing information with others	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Manage and implement small projects	D1.HGE.CL7.04 D1.HGA.CL6.11
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Plan project						
Develop the objectives and scope of the project in consultation with appropriate colleagues and customers						
Determine and develop a resource strategy for the project						
Evaluate the financial viability of the project through analysis of key factors						
Plan and create an administrative structure for the project						
Allocate project responsibilities in agreement with others, and clearly communicate responsibilities to all involved						
Plan internal and external communications, and public relations and marketing strategies together with appropriate colleagues						
Reach agreement on suitable project evaluation methods						
Develop an overall project management plan and communicate plan to appropriate colleagues						
Identify key project milestones and communicate these to persons involved						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 2: Administer and monitor project						
Implement and monitor project in conjunction with project team members						
Provide support and assistance to team members, as required						
Build trust and respect within the project team						
Assess and review progress against project goals and in consultation with project team members						
Determine the need for additional project resources and take action accordingly						
Monitor budget in accordance with enterprise guidelines						
Provide regular reports on project progress to all appropriate colleagues/customers						
Complete the project within agreed time lines						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	**Observation of skills**	**3rd Party Statement**	**Oral Questions**	**Written Questions**	**Work Projects**	**Other**
Element 3: Evaluate project						
Assess project at specified stages, using agreed evaluation methods						
Take account of agreed goals and priorities when carrying out a project evaluation						
Involve project team members, appropriate colleagues and customers in the project evaluation						
Incorporate evaluation results into ongoing project management						
Share information from project evaluation with appropriate colleagues and incorporate information into future planning						
Report on project						
Candidate signature			**Date**			
Assessor signature			**Date**			

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