



BSB01 Business Services Training Package

Project Management Competency Standards

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BSBPM401A Apply scope management techniques

Unit Descriptor

This unit specifies the outcomes required to contribute to the project's scope by assisting with the identification of objectives, deliverables, constraints, assumptions and outcomes; and by applying controls once the project has commenced.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A project team member usually performs this function, under the direction of the project manager and working with other project team members.

The functions performed by a project team manager to manage the scope of the whole project are addressed in BSBPM502A Manage project scope.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Contribute to scope definition

- 1.1 Contribution is made to the identification of *project deliverables*
- 1.2 Contribution is made to the identification of measurable outcomes to enable evaluation of project performance
- 1.3 Contribution is made to the development of the *scope management plan*

2. Apply project scope controls

- 2.1 Work is undertaken in accordance with agreed project management plan and by using established *change control procedures* and *performance measurement procedures*
- 2.2 Aspects of project scope are monitored and controlled and instances of non-compliance with overall scope are communicated to the project manager
- 2.3 Progress is measured to determine potential, perceived and actual scope changes
- 2.4 Scope changes are reported appropriately
- 2.5 Assistance is provided in the review of project outcomes to determine the effectiveness of initial and subsequent scope management approaches

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Project deliverables may include:

- products and services defined within the project scope

Scope management plan may include:

- project objectives
- deliverables, activities and tasks
- constraints and assumptions
- work organisation and/or product break-down structures
- project benefits and outcomes

Change control procedures may include:

- identifying designated elements of the project liable to change, for example finance and duration of tasks
- adjusting designated project documentation, for example plans, schedules, directives, guidelines and instructions which include change instructions, change request procedures and nominated change authorities

Performance measurement procedures may include:

- using tools and techniques to manage and measure project progress in terms of time and resources

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have contributed to the management of the scope of the project. This will include evidence of working with others to define and document the scope, including the planned outcomes of the project; working within the project plan and tracking the monitoring and controlling of the project with respect to the scope of the project; and applying scope controls within the project, as required. This contribution may be within own area of expertise or across several aspects of the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- project management methodology
- the need for scope definition during project start-up
- the importance of, and techniques related to, task definition
- the place of scope management in the context of the project life cycle
- an understanding of scope change control procedures
- methods to define products and activities, for example a simple work breakdown structure

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- planning
- monitoring and tracking
- teamwork and communication skills
- attributes:
 - attention to detail
 - accuracy
 - critical thinking

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (2)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)	<ul style="list-style-type: none"> • tracking, monitoring and controlling scope of project • applying relevant skills associated with reviewing project
Planning and organising activities (2)	<ul style="list-style-type: none"> • planning work and project tasks for self and with others
Working in a team (2)	<ul style="list-style-type: none"> • working with others, including external parties/clients and project team manager
Using mathematical ideas and techniques (1)	<ul style="list-style-type: none"> • using calculation skills associated with data manipulation involved in project
Solving problems (2)	<ul style="list-style-type: none"> • applying problem-solving skills to address problems arising with project scope
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages to produce written plans, scope definitions, reports of project activities, and in communication with stakeholders • using assistive technology, if required
Innovation skills (–)	<ul style="list-style-type: none"> • not applicable

Products that could be used as evidence include:

- scope definition document as basis of initial project approval (may be called ‘project proposal’ or similar title)
- lists of project objectives, deliverables, constraints, assumptions and outcomes
- task definition or work break-down structure
- progress and performance measurement reports
- scope change proposals
- project reviews
- records of major scope issues

Processes that could be used as evidence include:

- how project scope was defined
- how outcomes of project were determined
- how requirements of project were determined
- how own contribution to project was planned and implemented
- how scope of project was tracked, monitored and controlled
- how need for action in relation to project scope was identified and addressed
- how projects were reviewed for compliance to scope and to scope change management

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has contributed to planning or monitoring project scope (bearing in mind project team members may contribute to several projects simultaneously, and also may be a permanent team member for one project for an extended period)

Integrated competency assessment means:

- that this unit should be assessed with other project management units at Certificate IV, as applicable to candidate's role in the project

BSBPM402A Apply time management techniques

Unit Descriptor This unit specifies the outcomes required to assist with scheduling activities associated with a project, to apply the agreed schedule and assist in monitoring it.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project team member usually performs this function under the overall direction of the project manager and working with other project team members. The functions performed by a project team manager to manage the time management for the whole project are addressed in BSBPM503A Manage project time.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Assist in the development of project schedules

- 1.1 Within *delegated authority*, contribution is made to determine the duration and effort, sequence and dependencies of tasks to meet project objectives
- 1.2 *Project scheduling tools and techniques* are used to help establish and integrate planned time management aspects of the schedule, resource allocation and financial requirements
- 1.3 Contribution is made to the agreement process and communication of the schedule to the client and other stakeholders

2. Apply agreed schedules

- 2.1 Techniques are used to measure, record and report progress of activities in relation to agreed schedules and plans
- 2.2 Variance between actual and planned *progress* is recorded and reported to *others* for remedial action
- 2.3 Contribution is made to forecasting the impact of changes on the schedule and analysis of options
- 2.4 Agreed changes to the schedule are implemented and plans are updated as directed to accommodate changing situations throughout the project

3. Participate in assessing time management outcomes

- 3.1 Assistance is provided in the *review of project outcomes* to determine the effectiveness of time management tools, techniques and approaches used
- 3.2 Scheduling and time management issues and responses are reported to project manager for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Delegated authority means:

- within established organisational framework, procedures and routines
- under limited guidance and supervision
- within agreed authorisation and limits
- in a multi-disciplinary environment subject to frequent change

Project scheduling tools and techniques may include:

- using personal experience and/or experts
- assisting in qualitative and/or quantitative time analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
- using specialist time analysis tools to provide output to assist in the decision making process

Progress as recorded may include:

- lists of potential schedule events
- diaries, incident logs, occurrence reports and other similar documentation
- project and/or organisation files and records

Others may include:

- project manager
- higher project authority
- team members
- project specialist or other personnel

Review of project outcomes may include:

- achievement of agreed major milestones, for example phases and sub-contracts
- delivery of major deliverables
- change of key personnel
- finalisation of project and other agreed milestones

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have made contributions to the time management of projects. This will include evidence of working with others to determine schedules for the project and project components; monitoring the progress of the project against the agreed schedule; and reviewing time management as part of the review of the project on completion and closure. This contribution may be within own area of expertise or across several aspects of the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for time management within the broad project management framework
- the application of time management tools, techniques and approaches within the individual's area of expertise
- how, when and why schedule identification, monitoring and reporting processes are implemented
- the importance of the individual's contribution to the cost management process

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- time management skills
- planning
- monitoring and control
- teamwork and communication skills
- attributes:
 - attention to detail
 - accuracy

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (2)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking and monitoring scheduling of project
- applying relevant skills associated with reviewing project

Planning and organising activities (2)

- planning work and project tasks for self and with others

Working in a team (2)

- working with others including external parties/clients and project team manager

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project

Solving problems (2)

- applying problem-solving skills where required to address problems arising in managing time within projects

Using technology (2)

- using word processing packages to produce written correspondence and reports of project activities
- using specific project management software tools
- using assistive technology, if required

Innovation skills (–)

- not applicable

Products that could be used as evidence include:

- lists of project activities, including schedule, resource and cost estimates
- use of project scheduling tools and techniques
- records of progress and of deviations from the project schedule
- reports to project manager
- ongoing input to the project schedule

- contribution to project schedule review(s), including reports of lessons learned and recommendations
- Processes that could be used as evidence include:**
- how project schedule was defined
 - how agreement was reached on schedule
 - how project components were monitored with respect to time management
 - how problems/issues identified through time management processes were acted upon
 - how time management within projects was reviewed
 - how identified improvements in time management of projects were acted upon
- Resource implications for assessment include:**
- access to workplace documentation
- Validity and sufficiency of evidence requires:**
- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
 - examples of projects where the candidate has contributed to managing time within projects
- Integrated competency assessment means:**
- that this unit should be assessed with other project management units at Certificate IV, as applicable to the candidate's role in the project

BSBPM403A Apply cost management techniques

Unit Descriptor

This unit specifies the outcomes required to work with others to produce a project budget, monitor project expenditure, and contribute to cost finalisation processes.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A project team member usually performs this function under the overall management of the project manager and working with other project team members. The functions performed by a project team manager to manage costs for the whole project are addressed in BSBPM504A Manage project costs.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Assist with the development of the project budget

- 1.1 *Estimated costs* are determined for tasks and activities and communicated to *others* for inclusion in project budget
- 1.2 Costs are mapped against duration/effort and resources allocated, and communicated to project manager for inclusion in the project plan, budget and expenditure flow
- 1.3 Within *delegated authority*, contribution is made to the development of *cost management strategies and processes*, and financial authorisation

2. Monitor project costs

- 2.1 Income and expenditure are monitored against the agreed project plan and budgets to facilitate cost management throughout the project life cycle
- 2.2 Established cost management methods, techniques and tools are used to identify and report variations in the budget to higher project authority for action
- 2.3 Agreed actions are implemented and monitored, and progress is reported to others to ensure cost objectives are achieved throughout the project life cycle

3. Contribute to cost finalisation process

- 3.1 Assistance is provided in the finalisation and transfer of financial assets, liabilities and records to the client or relevant operational support agency

- 3.2 Assistance is provided in the review of project outcomes by use of *project records* to determine the effectiveness of initial and subsequent cost management strategies and processes
- 3.3 Cost management issues and responses are reported to higher project authority for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Estimated costs may include:

- labour
- project management overheads
- facilities
- travel and subsistence
- contingency (as outcome of risk assessment)
- material
- application and registration fees for intellectual property (IP) and patents etc.

Others may include:

- project manager
- higher project authority
- team members
- project specialists or other personnel

Delegated authority means:

- within established organisational framework, procedures and routines
- conducted under limited guidance and supervision
- within agreed authorisation and limits
- subject to frequent change in a multi-disciplinary environment

Cost management strategies and processes may include:

- measurement of actual progress against planned milestones
- recording and reporting of variations

- implementation of financial control mechanisms
- communication with stakeholders, dispute resolution and modification procedures

Project records may include:

- lists of potential costs
- invoice and payment records
- cost verification and validation documentation
- input to cost management plans
- reports to higher authority
- project and/or organisation files and records
- cost management lessons learned

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have made contributions to the cost management of projects. This will include evidence of working with others to develop a budget for the project; monitoring expenditure within the project against the agreed budget; managing financial completion activities; and reviewing expenditure as part of the review of the project on completion and closure. This contribution may be within own area of expertise or across several aspects of the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for cost management within the broad project management framework
- the place of cost management in the context of the project life cycle and other project management functions
- the application of cost management tools and techniques within the individual's area of expertise
- how, when and why cost management processes are implemented
- the importance of the individual's contribution to the cost management process

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- financial management skills
- planning
- monitoring and tracking

- teamwork and communication skills
- attention to detail and accuracy

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (2)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- monitoring and controlling project finances
- reviewing projects

Planning and organising activities (2)

- planning work and project tasks for self and others

Working in a team (2)

- working with others, including external parties/clients and project team manager

Using mathematical ideas and techniques (2)

- using calculation skills associated with monitoring aspects of finances involved in project
- developing, or assisting in developing, budgets for projects

Solving problems (2)

- applying problem-solving skills where required to manage costs within projects

Using technology (2)

- using word processing packages and spreadsheets to produce written correspondence, reports of project activities and financial reports
- using specific project management software tools
- using assistive technology, if required

Innovation skills (–)

- not applicable

Products that could be used as evidence include:

- cost estimates in area of expertise
- use of cost management tools and techniques
- records of income and expenditure
- records and reports of progress of cost activities
- implementation, maintenance and control functions of the cost management system

- cost review(s), including reports of lessons learned and recommendations for improvement
- Processes that could be used as evidence include:**
- how budget was developed
 - how financial monitoring processes were established
 - how finances in project were monitored and how identified problems/issues were acted upon
 - how completion activities were undertaken
 - how project was reviewed with respect to costs
 - how identified improvements to project were acted upon in relation to costs
- Resource implications for assessment include:**
- access to workplace documentation
- Validity and sufficiency of evidence requires:**
- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
 - examples of projects where the candidate has contributed to managing costs within each project
- Integrated competency assessment means:**
- that this unit should be assessed with other project management units at Certificate IV, as applicable to the candidate's role in the project

BSBPM404A Apply quality management techniques

Unit Descriptor	This unit specifies the outcomes required to enhance project outcomes through the application of the quality policy by contributing to quality planning, applying quality policies and procedures, and contributing to continuous improvement within projects.
Competency Field	<i>Business management services</i>
Domain	<i>Project management</i>
Application of the Competency	A project team member usually performs this function under the overall direction of the project manager and working with other project team members. The functions performed by a project team manager to manage quality for the whole project are addressed in BSBPM505A Manage project quality.

Element	Performance Criteria
Elements define the critical outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. <i>Italicised</i> terms are elaborated in the Range Statement.
1. Contribute to quality planning	<p>1.1 Contribution is made in determining quality requirements of project stakeholders</p> <p>1.2 Contribution is made in establishing quantifiable quality criteria for project outcomes and objectives</p> <p>1.3 <i>Information</i> is sourced to locate and interpret quality policy and procedures</p> <p>1.4 Contribution is made to the development of quality requirements in the project plan and processes</p>
2. Apply quality policies and procedures	<p>2.1 Under <i>delegated authority</i>, work is undertaken to implement <i>quality assurance</i> within the project in accordance with agreed quality standards and guidelines</p> <p>2.2 Records and documentation are maintained in accordance with set procedures to facilitate <i>quality control</i> and to provide an audit trail</p> <p>2.3 Results of project activities and product performance are documented and evaluated to determine compliance with agreed quality standards</p> <p>2.4 Shortfalls in quality outcomes are reported to <i>others</i> to enable appropriate action to be initiated</p>
3. Contribute to continuous improvement process	<p>3.1 Assistance is provided in the ongoing review of project outcomes to determine the effectiveness of quality management activities</p>

3.2 Quality management issues and responses are reported to *others* for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Information may include:

- project quality guidelines and instructions
- designated standard operating procedures and regulations
- organisational quality management policy and guidelines as applied to specific requirements of a project
- organisation and project standards

Delegated authority refers to those activities that are:

- within established organisational framework, procedures and routines
- carried out under limited guidance and supervision
- within agreed authorisation and limits
- subject to frequent change in a multi-disciplinary environment

Quality assurance may include:

- a systematic review of the project management process to ensure compliance with organisational policy and guidelines
- a project finalisation process to capture lessons learned and enable continuous improvement

Quality control activities may include:

- monitoring conformance with the specification
- inspections and audits in compliance with guidelines
- reporting of variances
- recommending ways to eliminate causes of unsatisfactory performance of products or processes
- regular inspection by the individual or the monitoring of inspections by internal or external agents

Others may include:

- project manager
- higher project authority
- team members
- project specialists or other personnel

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have contributed the quality management of projects. This will include evidence of working with others to develop quality plans and quality assurance mechanisms for the project; monitoring and controlling quality within the project against requirements, and acting on identified problems/issues; contributing to continuous improvement; and reviewing quality on project completion and closure. This contribution may be within own area of expertise or across several aspects of the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for quality management within the broad project management framework
- the place of project quality management in the context of the project life cycle and other project management functions
- the application of quality management tools and techniques within the candidate's area of expertise
- how, when and why project quality management processes are implemented
- the importance of the individual's contribution to the project quality management process

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project quality assurance skills
- project quality control skills
- project quality planning
- quality monitoring and control
- teamwork and communication skills
- attributes
 - attention to detail
 - accuracy

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit.

Communicating ideas and information (3)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking and monitoring and controlling quality within project
- applying relevant skills associated with reviewing project

Planning and organising activities (2)

- planning work and project tasks for self and with others

Working in a team (2)

- working with others, including external parties/clients and project team manager

Using mathematical ideas and techniques (1)

- using calculation skills associated with specifications development conformance criteria involved in the project

Solving problems (2)

- applying problem-solving skills where required to address problems arising in managing quality within the project

Using technology (2)

- using word processing packages to produce written correspondence, reports of project activities
- using specific project management software tools
- using assistive technology, if required

Innovation skills (–)

- not applicable

Products that could be used as evidence include:

- records of input to identification of stakeholder expectations, quality objectives, standards and levels
- records of input to the quality management plan
- records of use of quality management tools
- records of inspections and reports on project quality outcomes
- reports of progress on project quality issues

- input to project quality reviews, including reports of lessons learned and recommendations for improvement

Processes that could be used as evidence include:

- how project quality plan was developed
- how project quality requirements were determined
- how project quality assurance plan was implemented or integrated within overall project plan
- how project quality was monitored within project
- how issues/problems identified with project quality within project were acted upon
- how projects were reviewed in relation to quality and identified improvements were acted upon

Resource implications for assessment include:

- access to workplace documentation
- access to/inspection of audit trails of project documentation and organisational quality policy and guidelines

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has contributed to managing quality within projects

Integrated competency assessment:

- this unit should be assessed with other project management units at Certificate IV, as applicable to the candidate's role in the project

BSBPM405A Apply human resources management approaches

Unit Descriptor This unit specifies the outcomes required to assist with aspects of human resources management of a project. This involves calculating human resource requirements and skills levels for achievement of project tasks, identifying the learning and development needs of people working on the project, facilitating these needs being met, and resolving and preventing conflict within the team.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project team member usually performs this function under the overall direction of the project manager and working with other project team members. The functions performed by a project team manager to manage human resources for the whole project are addressed in BSBPM506A Manage project human resources.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Assist with determination of human resource requirements

- 1.1 *Work break-down structure* is analysed to determine *human resource requirements*
- 1.2 Assessment is made of skill levels of project personnel against project task requirements
- 1.3 Contribution is made to stakeholder analysis, and stakeholder expectations are quantified and qualified
- 1.4 Responsibilities are assigned for achieving project deliverables

2. Assist with human resource control and stakeholder management

- 2.1 The work of project personnel is monitored against assigned roles and responsibilities
- 2.2 Actual effort is tracked, monitored and controlled against plan, and skill levels are reviewed against allocated tasks, and remedial action is recommended, where required, to *others*
- 2.3 Contribution is made to tracking, monitoring and controlling stakeholder participation in and communication with the project

- | | |
|---|---|
| 2.4 | Others are advised when assigned responsibilities are not met by project personnel, or stakeholder expectations are at variance |
| 2.5 | Work is undertaken in a multi-disciplinary environment in accordance with established human resource management <i>practices, plans, guidelines and procedures</i> to achieve designated project objectives |
| 2.6 | Potential and actual conflicts are resolved in accordance with agreed dispute resolution processes or are reported to others for resolution |
| 2.7 | <i>Human resource development opportunities</i> are offered to individuals with skill gaps |
| 3. Contribute to conclusion of human resource practices and stakeholder management | |
| 3.1 | Contribution is made to assess the overall effectiveness of project human resource management, and lessons learned are documented |
| 3.2 | Human resource issues are reported to others to aid the continuous improvement process |
| 3.3 | Contribution is made to stakeholder satisfaction analysis, and in post-project operational review |

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Work break-down structure is:

- a planning tool or process which divides and subdivides the work of a project into smaller, more manageable work packages

Human resource requirements may include occupations such as:

- engineer, inspector, systems analyst, researcher, labourer, industrial chemist, accountant, editor, writer, statistician etc

Others may include:

- project manager
- higher project authority
- team members
- project specialists or other personnel

Practices, plans guidelines and procedures may include:

- project human resources management plan
- organisation project management procedures
- skills framework nominating skill levels required for specific types of project activities
- staffing plan/job description
- industrial relations agreements and guidelines
- professional operating standards

Human resource development opportunities may include:

- project management
- general management
- project administration, for example computer applications and filing systems
- specialist/professional skills and career progression
- interpersonal communications
- team building and group activities
- coaching and mentoring

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have contributed to the human resources management of projects. This will include evidence of working with others to facilitate achievement of project outcomes; practising resource management, including stakeholder management; preventing and resolving conflict; and supporting and developing skills in the project team.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for human resources management within the broad project management framework
- the place of project human resources management in the context of the project life cycle and other project management functions
- the application of project human resources management tools and techniques within the candidate's area of expertise

- Required skills and attributes include:**
- how, when and why project human resources management processes are implemented
 - the importance of the individual's contribution to the project human resources management process
 - ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
 - human resource management skills
 - planning
 - monitoring and tracking
 - teamwork and communication skills
 - attributes:
 - empathy
 - attention to detail
 - ability to work with others
 - belief in the value of learning and development

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

- | | |
|--|--|
| Communicating ideas and information (2) | <ul style="list-style-type: none"> • communicating as part of a team, including negotiating and developing reports • communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions |
| Collecting, analysing and organising information (2) | <ul style="list-style-type: none"> • tracking and monitoring human resources within the project • applying relevant skills associated with reviewing project human resources management |
| Planning and organising activities (2) | <ul style="list-style-type: none"> • planning work and project tasks for self and with others |
| Working in a team (2) | <ul style="list-style-type: none"> • working with others, including external parties/clients and project team manager |
| Using mathematical ideas and techniques (1) | <ul style="list-style-type: none"> • calculating associated with data manipulation involved in project |

Solving problems (2)	<ul style="list-style-type: none"> • applying problem-solving skills where required to address problems arising in managing people within projects, and the broader implications of (sometimes conflicting) stakeholder expectations
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages to produce written correspondence and reports of project activities • using specific project management, resource and HR management software tools • using assistive technology, if required
Innovation skills (–)	<ul style="list-style-type: none"> • not applicable
Products that could be used as evidence include:	<ul style="list-style-type: none"> • resource management (identification, allocation, tracking) records • responsibility assignment and resource assignment registers/tables • lists of individual and group competencies • input to the project human resources management plan • records of contribution to team activities, including team training and development • conflict resolution records
Processes that could be used as evidence include:	<ul style="list-style-type: none"> • how resources were allocated and tracked for suitability of numbers/effort and skill levels • how project responsibilities were assigned and tracked for accountability/conformance • how conflict between team members was resolved and actions taken to prevent conflicts eventuating • how human resource management issues were acted upon including reporting up to a higher authority
Resource implications for assessment include:	<ul style="list-style-type: none"> • access to workplace documentation
Validity and sufficiency of evidence requires:	<ul style="list-style-type: none"> • that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment • examples of projects where the candidate has contributed to managing human resources for projects
Integrated competency assessment means:	<ul style="list-style-type: none"> • that this unit should be assessed with other project management units at Certificate IV, as applicable to candidate's role in the project

BSBPM406A Apply communications management techniques

Unit Descriptor This unit specifies the outcomes required to provide a critical link between people, ideas and information at all stages in the project lifecycle. It covers assisting the project team to plan communications, facilitating information flow, communicating information related to the project, and reviewing communications.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project team member usually performs this function under the overall direction of the project manager and working with other project team members. The functions performed by a project team manager to manage communications within projects are addressed in BSBPM507A Manage project communications.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Contribute to communications planning

- 1.1 Relevant information requirements are identified, sourced and contributed to initial project documentation
- 1.2 Contribution is made to the development and implementation of the communications plan and communications networks

2. Conduct information management activities

- 2.1 Information is gathered, validated, stored, retrieved, filtered and disseminated as directed, within agreed procedures to aid decision making processes throughout project life cycle
- 2.2 Information is maintained to ensure security and auditability of data

3. Communicate project information

- 3.1 *Communication within project, with client and other stakeholders* is undertaken within agreed networks, processes and procedures to ensure flow of necessary information
- 3.2 Reports are written and released in accordance with authorisation, or drafted for release by *others*
- 3.3 Information and advice are sought from appropriate project authorities when in doubt

4. Contribute to assessment of communications management outcomes

- 4.1 Assistance is provided in the ongoing review of project outcomes to determine the effectiveness of communications management activities
- 4.2 Communications management issues and responses are reported to higher project authorities for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Communication within project, with client and stakeholders will be:

- within established organisational framework, procedures and routines
- under limited guidance and supervision
- within agreed authorisation and limits
- in a multi-disciplinary environment subject to frequent change
- and may include:
 - written reports, briefs, minutes, letters and other documentation
 - oral briefings, advice and conversations and telephone calls
 - computer generated communications, for example electronic data transfer and internet

Others may include:

- project manager
- higher project authorities
- team members
- project specialists or personnel

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have contributed to the management of communications within projects. This will include evidence of working with others to plan communications for the project; managing information flow for the project, including information coming into the project and information disseminated from and about the project; and reviewing communications within the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for project communications management within the broad project management framework
- the place of project communications management in the context of the project life cycle and other project management functions
- the application of project communications management tools and techniques within the individual's area of expertise
- the process of drafting, obtaining endorsement and forwarding reports to a higher authority
- how, when and why project communications management processes are implemented
- the importance of the individual's contribution to the project communications management process

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
- planning
- monitoring and tracking
- teamwork and communication skills, including writing skills
- attributes:
 - accuracy
 - attention to detail

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (2)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking and monitoring communications within project
- applying relevant skills associated with reviewing projects

Planning and organising activities (2)

- planning work and project tasks for self and with others

Working in a team (2)

- working with others, including external parties/clients and project team manager

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project

Solving problems (2)

- applying problem-solving skills where required to address problems arising in managing communications within projects

Using technology (2)

- using word processing packages to produce written correspondence and reports of project activities
- using specific project management software tools
- using assistive technology, if required

Innovation skills (–)

- not applicable

Products that could be used as evidence include:

- documented communications plan or communications element of (master) project plan
- reports and meetings timetable/attendance criteria (attend, be informed, etc)
- progress and exception reports
- project meeting minutes

- registers of communications involved with the project such as files, registers, lists, information distribution lists
- examples of communications generated about the project for third parties such as reports, memos and letters
- reviews undertaken of project communications
- project completion reports with actions arising/undertaken
- identified improvements arising from review process

Processes that could be used as evidence include:

- how communication plan was developed
- how project information requirements were determined
- how project meetings were planned, carried out, minuted and acted upon
- how information flow was managed within the project
- how project reporting process was developed and implemented
- how need for information to be disseminated was determined
- how information was shared among team members
- how communication strategy was reviewed for project
- how identified improvements to communications were acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has contributed to managing communications

Integrated competency assessment means:

- that this unit should be assessed with other project management units at Certificate IV, as applicable to the candidate's role in the project

BSBPM407A Apply risk management techniques

Unit Descriptor This unit specifies the outcomes required to assist with aspects of risk management within a project. It specifically involves assisting the project team to plan, control and review risks associated with the project.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project team member usually performs this function under the overall direction of the project manager and working with other project team members. The functions performed by a project team manager to manage risks within projects are addressed in BSBPM508A Manage project risk.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Assist with risk analysis and planning

- 1.1 Contribution is made to identify and prioritise potential risks throughout the project life cycle
- 1.2 Within *delegated authority*, input is provided to develop risk management strategies and risk management plans within established guidelines
- 1.3 Established *risk analysis methods, techniques and tools* are used to assist in the analysis of risks
- 1.4 Reporting mechanisms for risks are planned and agreed

2. Conduct risk control activities

- 2.1 Control activities are undertaken in accordance with agreed project and risk management plans to achieve project objectives
- 2.2 Progress is measured, and perceived, potential or actual risks are acted on within authority or reported to *others* for response
- 2.3 Contribution is made to the implementation of agreed risk approaches and the amendment of plans to reflect the changing environment
- 2.4 *Opportunities* are identified and reported for action in the same way as risks

3. Contribute to assessing risk management outcomes

- 3.1 Contribution is made to the ongoing *review* of project outcomes to determine the effectiveness of risk management activities by accessing project *records* and other available information

- 3.2 Risk management issues and responses are reported to others for lessons learned or application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Risk analysis methods, techniques and tools may include:

- using personal experience and/or subject matter experts
- assisting in qualitative and/or quantitative risk analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
- using specialist risk analysis tools to assist in the decision making process

Delegated authority means:

- within established organisational framework, procedures and routines
- under limited guidance and supervision
- within agreed authorisation and limits
- subject to frequent change in a multi-disciplinary environment

Others may include:

- project manager
- higher project authorities
- team members
- project specialists or personnel

Opportunities may include:

- better means of achieving a result
- efficiencies or methods to work more effectively, such as ways of shortening an activity
- responses to changing commercial/competitive conditions
- changes in the project or broader environment that offer scope for rescheduling activities to better effect

- initial project activities that reveal entirely different sets of priorities, for example product development, research and policy development
- Review* may include evaluations of:
- agreed major milestones, for example phases and sub-contracts
 - delivery of major deliverables
 - change of key personnel
 - finalisation of project and other agreed milestones
- Records* may include:
- lists of potential risk events (risk register/log)
 - risk analysis and reappraisal
 - risk management plan
 - risk diaries, incident logs, occurrence reports and other such documentation
 - project and/or organisation files and records
 - risk management lessons learned

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have contributed to the management of risk within projects. This will include evidence of working with others to identify risk and develop risk management strategies; controlling risks; monitoring risks (with an emphasis on variation management); and reviewing risk management within the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for project risk management within the broad project management framework
- the place of project risk management in the context of the project life cycle and other project management functions
- the application of project risk management tools and techniques within the candidate's area of expertise
- how, when and why risk identification, monitoring and reporting processes are implemented
- the importance of the individual's contribution to the project risk management process

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds' and physical and mental abilities
- risk management
- planning
- monitoring and tracking
- teamwork and communication skills
- attributes:
 - accuracy
 - attention to detail
 - thoroughness

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (2)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking, monitoring and controlling risk within the project
- applying relevant skills associated with reviewing projects

Planning and organising activities (2)

- planning work and project tasks for self and with others

Working in a team (2)

- working with others, including external parties/clients and project team manager

Using mathematical ideas and techniques (2)

- using calculating associated with data manipulation involved in the project

Solving problems (2)

- applying problem-solving skills where required to address problems arising in managing risk within projects

Using technology (2)

- using word processing packages to produce written correspondence and reports of project activities

<p>Innovation skills (–)</p>	<ul style="list-style-type: none"> • using specific project management and risk management software tools • using assistive technology, if required • not applicable
<p>Products that could be used as evidence include:</p>	<ul style="list-style-type: none"> • records of input to risk management risk management plan and strategies • lists of perceived, potential or actual risk events (risk register/log) • risk management reports • periodic reports that include updating project risk likelihood/impact ratings • pre-planned response mechanisms for level of risk likelihood per activity • records of (time/cost) contingency planning as an outcome of project risk management • records of input to project risk reviews, including reports of lessons learned and recommendations for improvement
<p>Processes that could be used as evidence include:</p>	<ul style="list-style-type: none"> • how risks were determined, analysed, prioritised and planned for • how risk management strategies were determined • how contingency management process was aligned to risk management (planning and control) process • how effectiveness of risk controls was monitored and any issues/problems acted upon • how risk management was reviewed for project and identified improvements acted upon
<p>Resource implications for assessment include:</p>	<ul style="list-style-type: none"> • access to workplace documentation
<p>Validity and sufficiency of evidence requires:</p>	<ul style="list-style-type: none"> • that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment • examples of projects where the candidate has contributed to managing risk for projects
<p>Integrated competency assessment means:</p>	<ul style="list-style-type: none"> • that this unit should be assessed with other project management units at Certificate IV, as applicable to the candidate’s role in the project

BSBPM408A Apply contract and procurement techniques

Unit Descriptor This unit specifies the outcomes required to assist with contracting and procurement for a project. It covers identifying procurement and contract requirements, contributing to contractor selection, conducting contracting and procurement activities, and conducting finalisation activities for the project.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project team member usually performs this function under the overall direction of the project manager and working with other project team members. The functions performed by a project team manager to manage procurement within projects are addressed in BSBPM509A Manage project procurement.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Assist with contract and procurement planning

- 1.1 Contribution is made to the establishment of procurement requirements
- 1.2 Under *delegated authority*, contribution is made to the development of the procurement management plan
- 1.3 Contribution is made to the development of project documentation for contract definition and formation

2. Contribute to contractor selection process

- 2.1 Information on potential suppliers is gathered and evaluated
- 2.2 Recommendations are made to assist in selection of preferred contractors
- 2.3 Contribution is provided to the definition of agreed terms and conditions with preferred contractor
- 2.4 Contribution is made to the development of the final tendering and contractual documentation

3. Conduct contracting and procurement activities

- 3.1 *Procurement activities* are undertaken and information is maintained so that reporting, confidentiality and audit requirements are met
- 3.2 Supplies are received, reconciled and registered in accordance with established procedures to facilitate payment throughout project

- 3.3 Contractors and suppliers and their activities are monitored and controlled for compliance with designated responsibilities, deliverables, time/cost and quality conformance, and other requirements
- 4. Conduct finalisation activities**
- 4.1 Testing and acceptance of supplies are undertaken to ensure quality and suitability for purpose
- 4.2 Assistance is provided in the ongoing *review* of project outcomes using available *records* and information to determine the effectiveness of contracting and procurement activities
- 4.3 Contracting and procurement management issues and responses are reported to *others* for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Delegated authority means:

- within established organisational framework, procedures and routines
- under limited guidance and supervision
- within agreed authorisation and limits
- subject to frequent change in a multi-disciplinary environment

Procurement activities may include:

- obtaining quotes from potential suppliers or providing quotes to potential clients or collaborating agencies and alliances
- identifying OHS issues
- confirming details
- obtaining approvals from higher project authorities
- formally receipting goods and services or providing formal notice of delivery of goods and services
- planning, specifying and/or conducting test and acceptance procedures
- maintaining registers and lists

- processing payment documentation
- liaising with client, contractors and sub-contractors, and other stakeholders
- conducting transfer and disposal actions

Review may include evaluations of:

- agreed major milestones, for example phases and sub-contracts
- delivery of major deliverables
- changes of key personnel
- finalisation of project and other agreed milestones

Records may include:

- lists of suppliers
- procurement logs, registers
- quotes, invoices and receipts
- test and acceptance results
- assets and disposal actions
- procurement reports
- records of contract planning, formation, negotiation or administration

Others may include:

- project manager
- higher project authorities
- team members
- project specialists or personnel

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have contributed to the management of contracting and procurement within projects. This will include evidence of working with others to plan and manage contracts/procurement; developing documentation used in compiling contracts, negotiation or administration of contracts; selecting contractors through organisational procedures; and reviewing contract/procurement management within the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- the need for project contract and procurement management within the broad project management framework
- OHS legislative requirements
- the place of project contract and procurement management in the context of the project life cycle and other project management functions
- the application of project contract and procurement management tools and techniques within the candidate's area of expertise
- how, when and why project contract and procurement management processes are implemented
- the importance of the individual's contribution in the project contract and procurement management process

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- procurement management
- contract definition, formation and administration management
- planning
- monitoring and tracking
- teamwork and communication skills
- attributes:
 - accuracy
 - attention to detail
 - thoroughness

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (2)

- communicating as part of a team, including negotiating and developing reports
- communicating verbally, including making presentations, if required, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking, monitoring and controlling contract and procurement activity within project
- applying relevant skills associated with reviewing projects

Planning and organising activities (2)

- planning work and project tasks for self and with others

Working in a team (2)

- working with others, including external parties/clients and project team manager

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project and financial management of procurement

Solving problems (2)

- applying problem-solving skills where required to address problems arising in managing procurement and contract activity within projects

Using technology (2)

- using word processing packages and spreadsheets to produce written correspondence, reports of project activities and procurement reports
- using specific project management software tools
- using assistive technology, if required

Innovation skills (–)

- not applicable

Products that could be used as evidence include:

- input to contract and procurement management plans
- records of potential suppliers
- records of input to the contractor evaluation and selection process
- procurement logs, registers and other records of quotes, invoices, receipts, test and acceptance results, assets and disposal actions

- procurement reports
 - records of input to contract and procurement reviews, including reports of lessons learned and recommendations for improvement
- Processes that could be used as evidence include:**
- how procurement requirements were determined
 - how procurement management plan was developed
 - how contractor selection process was implemented
 - how necessary procurement was managed
 - how contract and procurement activity was reviewed
- Resource implications for assessment include:**
- access to workplace documentation
- Validity and sufficiency of evidence requires:**
- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
 - examples of projects where the candidate has contributed to managing procurement and contracts for projects
- Integrated competency assessment means:**
- that this unit should be assessed with other project management units at Certificate IV, as applicable to the candidate's role in the project

BSBPM501A Manage application of project integrative processes

Unit Descriptor This unit specifies the outcomes required to integrate and balance the overall project management functions of scope, time, cost, quality, human resources, communications, risk and procurement, and align and track the project objectives to comply with organisational goals, strategies and objectives.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project manager usually performs this function. The functions performed by a program manager to manage integration within multiple projects are addressed in BSBPM601A Direct the integration of multiple projects/programs.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Manage integration of all functions of project management

- 1.1 Project stakeholders and their interests are identified with guidance of senior personnel
- 1.2 All *project management functions* are analysed with senior personnel and relevant stakeholders to determine achievable project objectives
- 1.3 The *project plan* is developed, to integrate all project management functions to achieve outcomes and requirements for time, cost, quality, risk/uncertainty
- 1.4 Project plan is endorsed by senior personnel
- 1.5 Designated control mechanisms are established to control planned activity

2. Coordinate internal and external environments

- 2.1 The project is managed within an established *internal working environment* to ensure work is conducted effectively throughout the project
- 2.2 Established links are maintained to align project objectives with organisation objectives throughout the project life cycle
- 2.3 Where necessary, assistance from senior personnel is sought to resolve conflicts which may negatively affect project objectives

3. Implement project activities throughout life cycle

- 3.1 Agreed project phases, approval points and review points occur
- 3.2 Progress is reported against established project baselines to measure performance throughout the project life cycle
- 3.3 Established *finalisation plans, procedures and activities* are implemented
- 3.4 *Integration management issues and recommended improvements* are identified, documented and passed on to senior personnel for application to future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

The nine *project management functions* are:

- project integration
- scope
- time
- cost
- quality
- human resources
- communications
- risk
- procurement and contracting

The *project plan* may include:

- a single document
- a covering document which integrates the requirements of the nine functions of project management using appropriate formats and procedures

The *internal environment* may include:

- physical location of project
- layout of project personnel and equipment
- personal working conditions
- team dynamics

- Finalisation plans, procedures and activities* may include:
- identity and differentiation of the project within the larger environment
 - transition of responsibility/ownership of project deliverables/products
 - transfer of assets to the client or originating owner
 - warranty requirements
 - project evaluation
 - final audit/reconciliation
 - settling of financial liabilities
 - finalisation of account codes and other financial documentation
 - forwarding finalisation report to senior personnel
- Integration management issues and recommended improvements* may include:
- evaluation using established success and failure criteria
 - lessons learned
 - knowledge management
 - training programs
 - records

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for integrating all project management functions (scope, time, cost, quality, human resources, communications, risk and procurement). This will include evidence of managing the work of others in the project team.

Specific Evidence Requirements

Required knowledge and understanding include:

- a broad knowledge and understanding of:
 - the project process, the project life cycle and the relationship between project phases
 - planning and control procedures, resource management and risk management
 - a range of suitable methodologies, techniques and tools available to project managers
 - the application of leadership and personnel management within a project environment
 - internal and external environment factors that may affect the project

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- planning and organising
- communication and negotiation
- problem-solving
- leadership and personnel management
- monitoring
- evaluation
- attributes:
 - analytical
 - able to maintain an overview
 - communicative
 - positive leadership
 - focused on outcomes

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)	<ul style="list-style-type: none"> • tracking and monitoring of project • applying relevant skills associated with reviewing projects
Planning and organising activities (2)	<ul style="list-style-type: none"> • planning own work and that of project team members
Working in a team (3)	<ul style="list-style-type: none"> • leading and representing the project team • working with others, including external parties/clients and project team members
Using mathematical ideas and techniques (1)	<ul style="list-style-type: none"> • using calculation skills associated with data manipulation involved in project including financial data
Solving problems (3)	<ul style="list-style-type: none"> • applying problem-solving skills, as required • assisting others to solve problems arising within the project
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation • using specific project management software tools • using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none"> • using review processes to inform future activity in project management
Products that could be used as evidence include:	<ul style="list-style-type: none"> • documentation produces in managing project integration, such as: <ul style="list-style-type: none"> – records of evaluation and consultative processes to determine achievable project objectives – project plans and sub-plans covering the nine functions of project management – records of evaluation of the impact of the organisation and other environments on project objectives – records of implementation of project phases and milestones – records of measurement and reporting of progress in relation to established baselines – finalisation plans – lists of integration management issues and recommended improvements

Processes that could be used as evidence include:

- how project planning was undertaken
- how team members were managed throughout projects
- how projects were monitored during the life cycle of the project
- how problems arising in projects were addressed
- how projects were finalised
- how projects were reviewed and lessons learned acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has managed integration for projects

Integrated competency assessment means:

- that this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in projects

BSBPM502A Manage project scope

Unit Descriptor This unit specifies the outcomes required to determine and control the end products of the project, and the processes to develop them. It covers project authorisation, developing a scope management plan, and managing the application of project scope controls.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project manager usually performs this function. The functions performed by a program manager to manage scope within multiple projects are addressed in BSBPM602A Direct the scope of multiple projects/programs.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Conduct project authorisation activities

1.1 *Project authorisation* is confirmed with a higher authority as the basis for future project management activity and commitment of resources and effort

2. Conduct project scope definition activities

2.1 Project objectives, *deliverables*, constraints and assumptions and principal work activities are identified with guidance of a higher project authority and agreed between the project team and the client

2.2 Designated measurable project benefits and outcomes are established to enable quantified evaluation of *project performance*

2.3 *Scope management* plan is developed and implemented

3. Manage application of scope controls

3.1 Agreed scope management procedures and processes are implemented

3.2 The impact of scope changes is managed within established time, cost and quality constraints according to *change control procedures* and to meet project objectives

3.3 Progress is reviewed and results recorded to assess the effectiveness of scope management procedures

3.4 Scope management issues and recommended improvements are identified, documented and passed on to a higher project authority for application to future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Project authorisation may:

- already have been decided before involvement of the project manager
- be required at a number of critical review points during the project
- be in the form of a scope statement which briefly explains why the project has been formed, what it hopes to achieve and how success will be measured

Project deliverables may include:

- all products and services defined within the project scope

Scope management may include:

- refining scope progressively throughout the project life cycle
- identifying and reporting scope creep, that is incremental increases to scope that were not part of the original project requirements
- identifying factors which influence changes to scope
- determining that a scope change has occurred or is about to occur
- seeking authorisation for changes to project scope
- implementing agreed scope changes
- monitoring and reporting the effect of scope changes on other areas and on achievement of project objectives

Change control procedures may include:

- major elements of the project liable to change, for example design, engineering, finance
- project documentation, including plans, schedules, statements, directives, guidelines and instructions
- formal agreements, for example contracts, sub-contracts, memoranda of understanding

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility for scoping projects. This will include evidence of managing the work of others within the project team to scope the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- a broad knowledge and understanding of:
 - organisational processes leading to project authorisation, start-up and designation of project manager
 - the place of scope management in the context of the project life cycle
 - the need for scope definition during project start-up and ongoing definition during the project
 - methods to define products and activities, for example work, organisation and product breakdown structures
 - the components of a scope statement
 - the practice of change control

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- planning and organising
- communication and negotiation
- problem-solving
- leadership and personnel management
- monitoring and review skills
- attributes:
 - analytical
 - able to maintain an overview
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking, monitoring and controlling the project
- applying relevant skills associated with reviewing the project

Planning and organising activities (2)

- planning own work and that of project team members

Working in a team (3)

- leading and representing the project team
- working with others, including external parties/clients and project team members

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems arising in managing the project
- assisting others to solve problems arising within project

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence, a plan, scope definition and reports of project activities, financial reporting and data collation
- using specific project management software tools
- using assistive technology, if required

Innovation skills (2)

- using review process to inform future activity in project management

Products that could be used as evidence include:

- documentation produced in managing scope of projects such as:
 - project scope documentation, including plans, schedules, statements, directives, guidelines and instructions
 - work breakdown, product breakdown and organisation breakdown structures
 - other scope definition documents
 - progress and performance measurement reports
 - change requests/change orders
 - records of control of scope changes
 - records of scope lessons learned

Processes that could be used as evidence include:

- how project authorisation was gained
- how project scope was defined
- how team members were managed throughout projects with respect to the scope of each project
- how the need for scope changes within projects were identified and implemented
- how projects were reviewed with respect to the scope of the project
- how improvements to scope management of projects were acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has undertaken project scope management responsibilities

Integrated competency assessment means:

- that this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in projects

BSBPM503A**Manage project time****Unit Descriptor**

This unit specifies the outcomes required to manage time within projects. It covers determining and implementing the project schedule and assessing time management outcomes.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A project manager usually performs this function. The functions performed by a program manager to manage time within multiple projects are addressed in BSBPM603A Direct time management of multiple projects/programs.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Determine project schedule

- 1.1 The duration and effort, sequence and dependencies of tasks are determined from the scope definition as the basis for the project schedule
- 1.2 Input to and approval for the project schedule are obtained from stakeholders and a higher authority
- 1.3 Within *delegated authority, methods, techniques and tools* are selected and used to determine preferred schedule, *time management plan(s)*, resource allocation and financial requirements
- 1.4 Agreement to the schedule is obtained from a higher project authority and communicated to stakeholders to provide the basis for measurement of progress

2. Implement project schedule

- 2.1 Mechanisms are implemented to measure, record and report progress of activities in relation to the agreed schedule and plans
- 2.2 Ongoing analysis of options is conducted to identify variances and forecast the impact of changes to the schedule
- 2.3 Progress is reviewed throughout the project life cycle and agreed schedule changes are implemented to ensure consistency with changing scope, objectives and constraints related to time and resource availability

2.4 Responses to perceived, potential or actual schedule changes are developed, agreed by a higher project authority, and implemented to maintain project objectives

3. Assess time management outcomes

3.1 Project outcomes are reviewed from available *records* and information to determine the effectiveness of time management activities

3.2 Time management issues and recommended improvements are identified, documented and passed on to a higher project authority for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Delegated authority refers to activities:

- being done independently within broad guidance or by taking the lead of a team
- involving consultation with other project members, teams and internal stakeholders
- involving the selection, use and supervision of appropriate time management methods, tools and techniques
- being conducted routinely or as changing circumstances dictate
- taking into account internal organisational change and external environmental change

Methods, techniques and tools may include:

- using personal experience and/or subject matter experts
- conducting or supervising qualitative and/or quantitative time analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
- using specialist time analysis tools to assist in the decision making process

Time management plans may include:

- project schedule and sub-schedules
- lists of milestones
- schedule management strategies and actions, standardised formal arrangements, responsibility assignment, contingency plans and assigned schedule management responsibilities

Records may include:

- lists of variances and forecasts of potential schedule events
- Gantt, PERT and other scheduling charts
- diaries, incident logs, occurrence reports and other such records
- records of analysis, evaluation of options, recommended and approved courses of action
- project and/or organisation files and records

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for time management of the projects. This will include evidence of managing the work of others within the project team with respect to time management of the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- a broad knowledge and understanding of:
 - the need to link time, cost and resources to the project schedule
 - responsibilities for time management
 - development of project schedules
 - use of the schedule as a control mechanism
 - the place of time management in the context of the project life cycle and other project management functions
 - appropriate time management methodologies, their capabilities, limitations, application and outcomes

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- time management

- planning and organising
- communication and negotiation
- problem-solving
- leadership and personnel management
- monitoring and review skills
- attributes:
 - analytical
 - able to maintain an overview
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking and monitoring the project
- applying relevant skills associated with reviewing the project

Planning and organising activities (2)

- planning own work and that of project team members

Working in a team (3)

- leading and representing the project team
- working with others, including external parties/clients and project team members

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems arising in managing the project
- assisting others to solve problems arising within project

Using technology (2)	<ul style="list-style-type: none">• using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation• using specific project management software tools• using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none">• using review process to inform future activity in project management
Products that could be used as evidence include:	<ul style="list-style-type: none">• documentation produced in managing projects:<ul style="list-style-type: none">– project work breakdown structure– key activity schedule– application of precedence and dependency principles to task definition– project schedule– regular schedule reports to stakeholders and a higher authority– application of monitoring, review and reporting mechanisms– application of actual progress against planned progress– records of recommendations for, and corrective actions taken against, variances in the project schedule– records of lessons learned
Processes that could be used as evidence include:	<ul style="list-style-type: none">• how the schedule of projects was determined• how agreement on schedule was reached with relevant parties• how team members were managed throughout projects with respect to time management within the project• how the schedule was managed throughout projects• how problems and issues with time management of projects were identified and addressed• how projects were reviewed with respect to time management of the project• how improvements to time management of projects were acted upon
Resource implications for assessment include:	<ul style="list-style-type: none">• access to workplace documentation
Validity and sufficiency of evidence requires:	<ul style="list-style-type: none">• that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment

**Integrated competency
assessment means:**

- examples of projects where the candidate has managed time and scheduling within projects
- that this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in projects

BSBPM504A Manage project costs

Unit Descriptor	This unit specifies the outcomes required to identify, analyse and refine project costs to produce a budget, and use this budget as the principal mechanism to control project cost.
Competency Field	<i>Business management services</i>
Domain	<i>Project management</i>
Application of the Competency	A project manager usually performs this function. The functions performed by a program manager to manage costs within multiple projects are addressed in BSBPM604A Direct cost management of multiple projects/programs.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Determine project costs

- 1.1 Resource requirements for individual tasks are determined, with input from stakeholders and guidance of *others*
- 1.2 *Project costs* are estimated to enable budgets to be developed and agreed cost management processes implemented
- 1.3 Within *delegated authority*, a cost management plan is developed and implemented to ensure clarity of understanding and ongoing management of project finances

2. Monitor and control project costs

- 2.1 Agreed *financial management processes and procedures* are implemented to monitor actual expenditure and to control costs
- 2.2 Cost analysis methods and tools are selected and used to identify cost variations, evaluate options and recommend actions to a higher project authority
- 2.3 Agreed actions are implemented, monitored and modified to maintain financial and overall project objectives throughout the project life cycle

3. Conduct financial completion activities

- 3.1 Appropriate activities are conducted to signify financial completion
- 3.2 *Review* of project outcomes is undertaken using available *records* and information to determine the effectiveness of cost management processes and procedures
- 3.3 Cost management issues and recommended improvements are identified

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Others may include:

- program manager
- higher project authority
- team members
- project specialists or other personnel

Project costs are estimated to a level of accuracy available considering:

- the stage of the project life cycle
- the availability of information at the time
- contingencies to allow for identified risks and uncertainty
- organisational requirements, for example overhead and profit margin

Delegated authority means that activities will:

- be done independently within broad guidance or by taking the lead of a team
- involve consultation with other project members, teams and internal stakeholders
- involve the selection, use and supervision of appropriate time management methods, tools and techniques
- be conducted routinely or as changing circumstances dictate
- take into account internal organisational change and external environmental change

Financial management processes and procedures may include:

- approval processes
- financial authorisations/delegations
- invoice procedures
- communication and reporting processes

Review may include evaluations of:

- agreed major milestones, for example phases and sub-contracts
- delivery of major deliverables

- change of key personnel
 - finalisation of project and other agreed milestones
- Records* may include:
- lists of potential costs
 - invoice and payment summaries
 - budgets, commitment and expenditure
 - cost management plans
 - reports to a higher authority
 - recommended and approved courses of action
 - project and/or organisation files and records
 - cost management lessons learned

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for cost of the projects. This will include evidence of managing the work of others within the project team with respect to cost management of the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- broad knowledge and understanding of:
 - the need to link time, cost and resources to the project framework
 - acceptance of responsibilities for cost management
 - development of project budgets and expenditure forecasts
 - use of the budgets and expenditure forecasts as control mechanisms
 - the place of cost management in the context of the project life cycle and other project management functions
 - appropriate cost management methodologies, their capabilities, limitations, application and outcomes

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- financial management
- planning and organising
- communication and negotiation

- problem-solving
- leadership and personnel management
- monitoring and review skills
- attributes:
 - analytical
 - able to maintain an overview
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking, monitoring and controlling financial aspects of the project
- reviewing the project

Planning and organising activities (2)

- planning own work and that of team members

Working in a team (3)

- leading and representing the project team
- working with others, including external parties/clients and project team members

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation, including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems arising in managing the project
- assisting others to solve problems within the project

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation
- using specific project management software tools

Innovation skills (2)

- using review process to inform future activity

Products that could be used as evidence include:

- documentation produced in managing project costs:
 - cost estimates
 - cost management plans and strategies
 - cost breakdown structures
 - project budgets and expenditure forecasts
 - financial transition plans
 - records of project finalisation activities and disposal of project assets
 - project finalisation reports
 - records of cost management lessons learned

Processes that could be used as evidence include:

- how resource requirements were determined
- how cost management plans were developed
- how team members were managed throughout projects with respect to the costs of the project
- how problems and issues with respect to costs were identified and addressed
- how projects were reviewed with respect to costs
- how cost management improvements were actioned

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has managed costs within projects

Integrated competency assessment means:

- this unit should be assessed with other project management units at a Diploma qualification as applicable to the candidate's management role in projects

BSBPM505A Manage project quality

Unit Descriptor This unit specifies the outcomes required to manage quality within projects. It covers determining quality requirements, implementing quality assurance processes, and using review and evaluation to make quality improvements in current and future projects.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project manager usually performs this function. The functions performed by a program manager to manage quality within multiple projects are addressed in BSBPM605A Direct quality management of multiple projects/programs.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Determine quality requirements

- 1.1 *Quality objectives*, standards and levels are determined, with input from stakeholders and guidance of a higher project authority, to establish the basis for quality outcomes and a *quality management plan*
- 1.2 Established *quality management methods, techniques and tools* are selected and used to determine preferred mix of quality, capability, cost and time
- 1.3 Quality criteria are identified, agreed with a higher project authority and communicated to stakeholders to ensure clarity of understanding and achievement of quality and overall project objectives
- 1.4 Agreed quality requirements are included in the project plan and implemented as basis for performance measurement

2. Implement quality assurance

- 2.1 Results of project activities and product performance are measured and documented throughout the project life cycle to determine compliance with agreed quality standards
- 2.2 Causes of unsatisfactory results are identified, in consultation with the client, and appropriate actions are recommended to a higher project authority to enable continuous improvement in quality outcomes

- 2.3 Inspections of quality processes and *quality control* results are conducted to determine compliance of quality standards to overall quality objectives
- 2.4 A quality management system is maintained to enable effective recording and communication of quality issues and outcomes to a higher project authority and stakeholders
- 3. Implement project quality improvements**
- 3.1 Processes are reviewed and agreed changes implemented continually throughout the project life cycle to ensure continuous improvement to quality
- 3.2 Project outcomes are reviewed against performance criteria to determine the effectiveness of quality management processes and procedures
- 3.3 Lessons learned and recommended *improvements* are identified, documented and passed on to a higher project authority for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Quality objectives may include:

- requirements from the client and other stakeholders
- requirements from a higher project authority
- negotiated trade-offs between cost, schedule and performance
- those quality aspects which may impact on customer satisfaction

A quality management plan may include:

- established processes
- authorisations and responsibilities for quality control
- quality assurance
- continuous improvement

Quality management methods, techniques and tools may include:

- group work activities
- brainstorming
- benchmarking
- charting processes
- ranking candidates
- defining control
- undertaking benefit/cost analysis
- processes that limit and/or indicate variation
- control charts
- flowcharts
- histograms
- pareto charts
- scattergrams
- run charts

Quality control may include:

- monitoring conformance with specifications
- recommending ways to eliminate causes of unsatisfactory performance of products or processes
- monitoring of regular inspections by internal or external agents

Improvements may include:

- formal practices, such as total quality management or continuous improvement
- improvement by less formal processes which enhance both the product quality and processes of the project, for example client surveys to determine client satisfaction with project team performance

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility for quality management of projects. This will include evidence of managing the work of others within the project team with respect to quality.

Specific Evidence Requirements

Required knowledge and understanding include:

- broad knowledge and understanding of:
 - the principles of project quality management and their application
 - acceptance of responsibilities for project quality management
 - use of quality management systems and standards
 - the place of quality management in the context of the project life cycle
 - appropriate project quality management methodologies; and their capabilities, limitations, applicability and contribution to project outcomes

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- quality management
- planning and organising
- communication and negotiation
- problem-solving
- leadership and personnel management
- monitoring and review skills
- attributes:
 - analytical
 - attention to detail
 - able to maintain an overview
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)	<ul style="list-style-type: none"> • tracking, monitoring and controlling quality of the project • applying relevant skills associated with reviewing the project
Planning and organising activities (2)	<ul style="list-style-type: none"> • planning own work and that of project team members
Working in a team (3)	<ul style="list-style-type: none"> • leading and representing the project team • working with others, including external parties/clients and project team members
Using mathematical ideas and techniques (1)	<ul style="list-style-type: none"> • using calculation skills associated with data manipulation involved in project including financial data
Solving problems (3)	<ul style="list-style-type: none"> • applying problem-solving skills as required to address problems arising in managing the project • assisting others to solve problems arising within project
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation • using specific project management software tools • using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none"> • using review process to inform future activity in project management
Products that could be used as evidence include:	<ul style="list-style-type: none"> • documentation produced in managing projects such as: <ul style="list-style-type: none"> – lists of quality objectives, standards, levels and measurement criteria – records of inspections, recommended rectification actions and quality outcomes – management of quality management system and quality management plans – application of quality control, quality assurance and continuous improvement processes – records of quality reviews – lists of lessons learned and recommended improvements

Processes that could be used as evidence include:

- how quality requirements and outcomes were determined for projects
- how quality tools were selected for use in projects
- how team members were managed throughout projects with respect to quality within the project
- how quality was managed throughout projects
- how problems and issues with respect to quality and arising during projects were identified and addressed
- how projects were reviewed with respect to quality management
- how improvements to quality management of projects have been acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has managed quality within projects

Integrated competency assessment means:

- this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in projects

BSBPM506A Manage project human resources

Unit Descriptor This unit specifies the outcomes required to undertake human resource management (HRM) within projects. It involves planning for human resources, implementing staff training and development, and managing the project team and stakeholders.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project manager usually performs this function. The functions performed by a program manager to manage human resources within multiple projects are addressed in BSBPM606A Direct human resources management of multiple projects/programs.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Implement human resource and stakeholder planning activities

- 1.1 Resource requirements for individual tasks are determined, with input from stakeholders and guidance from a higher project authority, to determine project staffing levels and required competencies
- 1.2 *Project organisation and structure* designated by a higher authority is established to align individual and group competencies with project tasks
- 1.3 Project stakeholders are identified and their expectations verified in order to quantify project outcomes
- 1.4 *Staff* are allocated to the project with the approval of a higher project authority to meet work requirements throughout the project life cycle
- 1.5 *HRM methods, techniques and tools* are developed and used to implement HRM procedures and plans to ensure clarity of understanding and ongoing human resource management

2. Implement staff training and development

- 2.1 Designated staff responsibilities, authority and individual performance measurement criteria are communicated to the project team and other relevant stakeholders to ensure clarity of understanding of the work and to provide a basis for ongoing assessment

- 2.2 Ongoing development and training of project team members is identified, planned, approved by a higher authority and implemented to achieve HRM and overall project objectives
- 2.3 Individuals' performance is measured against agreed criteria and actions are initiated to overcome shortfalls in performance and encourage career progression
- 3. Manage the project team and stakeholders**
- 3.1 Processes to promote continuous improvement of staff are implemented and actions taken to improve staff and overall project effectiveness
- 3.2 Internal and external influences on individual and project team member performance and morale are monitored and reported to a higher project authority, if necessary, for remedial action
- 3.3 Established procedures for interpersonal communication, counselling and conflict resolution are implemented to maintain a positive working environment
- 3.4 Stakeholder expectations are continually reviewed to resolve expectation variance and ensure the project is on track to deliver expected outcomes
- 3.5 Inter-project and intra-project conflict is identified and managed to minimise impact on achievement of project objectives
- 3.6 Human resource and stakeholder management issues and recommended improvements are identified, documented and passed on to a higher project authority for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Project organisation and structure may be affected by established organisation responses

- relevant legislation, such as anti-discrimination, equal employment opportunity, affirmative action and occupational health and safety

to external influences such as:

- workplace bargaining
- accepted work practices

Staff may come from:

- within the organisation, such as staff on loan from other projects
- external to the organisation, such as consultants, auditors and quality assurance specialists

HRM methods, techniques and tools may include established organisation responses to:

- individual and group competency identification and development
- HRM forecasts, staffing plans and job descriptions
- staff recruitment and reallocation
- performance monitoring, assessment and reporting
- conflict resolution

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for human resource management for the projects. This will include evidence of managing the work of others within the project team in the area of human resource management.

Specific Evidence Requirements

Required knowledge and understanding include:

- broad knowledge and understanding of:
 - the importance of HRM in the project management environment
 - established organisational policies, standards and methods required to achieve HRM outcomes
 - the use of established HRM selection, assignment, training, performance evaluation and motivation tools
 - the conflict and stress issues associated with individuals responsible for project management
 - human resource matrix management environment
 - HRM outcomes, critical success and failure criteria and HRM performance measures
 - the application of interpersonal skills
 - assessment of interpersonal strengths and weaknesses

	<ul style="list-style-type: none"> – the differences in work content, processes and risk that affect HRM requirements in the various phases of the project life cycle
Required skills and attributes include:	<ul style="list-style-type: none"> • ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities • project management • human resources management • planning and organising • communication and negotiation • problem-solving • leadership and personnel management • monitoring and review skills • attributes: <ul style="list-style-type: none"> – empathetic – able to maintain an overview – communicative – positive leadership
Key competencies or generic skills relevant to this unit	<p>The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:</p> <p>Level (1) represents the competence to undertake tasks effectively Level (2) represents the competence to manage tasks Level (3) represents the competence to use concepts for evaluating and reshaping tasks</p> <p>The bulleted points provide examples of how the key competencies can be applied for this unit</p>
Communicating ideas and information (3)	<ul style="list-style-type: none"> • communicating to lead a team, including negotiating and developing reports • communicating verbally, including making presentations, and participating in meetings, questioning and discussions
Collecting, analysing and organising information (2)	<ul style="list-style-type: none"> • tracking and monitoring of project • applying relevant skills associated with reviewing the project
Planning and organising activities (2)	<ul style="list-style-type: none"> • planning own work and that of project team members
Working in a team (3)	<ul style="list-style-type: none"> • leading and representing the project team • working with others, including external parties/clients and project team members

Using mathematical ideas and techniques (1)	<ul style="list-style-type: none"> • using calculation skills associated with data manipulation involved in project including financial data
Solving problems (3)	<ul style="list-style-type: none"> • applying problem-solving skills as required to address problems arising in managing the project • assisting others to solve problems arising within project
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation • using specific project management software tools • using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none"> • using review process to inform future activity in project management
Products that could be used as evidence include:	<ul style="list-style-type: none"> • documentation produced in managing projects: <ul style="list-style-type: none"> – current and future requirements for competency within the project team – staffing levels and competencies related to tasks – job descriptions including measures of performance – project organisation charts – staff recruitment and selection criteria – team and individual responsibilities, levels of authority and performance assessment criteria – responsibility assignment matrix – HRM plans and procedures – records of internal and external influences on HRM performance – HRM lessons learned
Processes that could be used as evidence include:	<ul style="list-style-type: none"> • how human resources requirements were determined for projects • how required human resources were allocated to and/or selected for projects • how team members were managed throughout projects with respect to human resources management within the project • how human resources were managed throughout projects including required training and development • how problems and issues with respect to human resources and arising during projects were identified and addressed

- how projects were reviewed with respect to human resources management
 - how improvements to human resources management of projects were acted upon
- Resource implications for assessment include:**
- access to workplace documentation
- Validity and sufficiency of evidence requires:**
- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
 - examples of projects where candidate has managed human resources within projects
- Integrated competency assessment means:**
- that this unit should be assessed with other project management units at a Diploma qualification as applicable to the candidate's management role in projects

BSBPM507A Manage project communications

Unit Descriptor This unit specifies the outcomes required to link people, ideas and information at all stages in the project life cycle. Project communications management ensures the timely and appropriate generation, collection, dissemination, storage and disposal of project information through formal structures and processes. It aids in decision making and the control of informal communication networks to facilitate the achievement of project objectives.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency The communications management function covers planning communication processes, managing project related information and reporting requirements, and assessing communications management outcomes against planned outcomes.

A project manager usually performs this function. The functions performed by a program manager to manage communications within multiple projects are addressed in BSBPM607A Direct communications management of multiple projects/programs.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Plan communications processes

- 1.1 Information requirements are identified, documented and analysed, with input from stakeholders and guidance of a higher project authority, as the basis for communications planning
- 1.2 Within *delegated authority*, an agreed communications management plan is developed to ensure clarity of understanding and achievement of project objectives throughout the project life cycle
- 1.3 Designated *project management information system*, structure and procedures are established and maintained to ensure the quality, validity, timeliness and integrity of information and communication

2. Manage information

- 2.1 The generation, gathering, storage, retrieval, analysis and dissemination of information by project staff and stakeholders is managed within established systems and procedures to aid decision making processes throughout the project life cycle

- 2.2 Designated information validation processes are implemented, modified, monitored and controlled to optimise quality and accuracy of data
- 2.3 Agreed *communication networks* between project staff, client and other stakeholders are implemented and maintained to ensure effective communications at appropriate levels throughout the project life cycle
- 3. Manage project reporting**
- 3.1 Communication and information management system problems are identified and reported to a higher project authority, and agreed remedial actions are implemented to ensure project objectives are met
- 3.2 Customer relationships are maintained within established guidelines to ensure clarity of understanding of objectives and to reduce conflict throughout the project life cycle
- 4. Assess communications management outcomes**
- 4.1 Finalisation activities are conducted to ensure agreed ownership of, and responsibility for, information collected
- 4.2 Project outcomes are reviewed to determine the effectiveness of management information and communications processes and procedures
- 4.3 Lessons learned and recommended improvements are identified, documented and passed on to a higher project authority for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Delegated authority means that activities may:

- be done independently within broad guidance or by taking the lead of a team
- involve consultation with other project members, teams and internal stakeholders

- involve the selection, use and supervision of appropriate communications management methods and tools
- be conducted routinely or as changing circumstances dictate
- take into account internal organisational change and external environmental change

A Project Management Information System (PMIS) is:

- a means for communicating knowledge about the project and provides a systematic approach to the storing, searching and retrieval of information relevant to the project
- and may include:
 - simple manual systems
 - complex computer-based systems
 - modified systems to cater for unique project requirements

Communication networks may include:

- formal networks
- informal networks
- specific networks
- the organisation's communication networks
- client organisation and end users

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for managing communications. This will include evidence of managing the work of others within the project team with respect to communications.

Specific Evidence Requirements

Required knowledge and understanding include:

- broad knowledge and understanding of:
 - the principles of communications management and their application
 - acceptance of responsibilities for communications management
 - maintenance of project management information systems and communications networks
 - drafting, vetting, approving, obtaining endorsement and forwarding reports to a higher authority
 - the place of communications management in the context of the project life cycle and other project management functions
 - appropriate communication management technologies; their capabilities, limitations, applicability and contribution to project outcomes

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- planning and organising
- communication and negotiation
- problem-solving
- leadership and personnel management
- monitoring and review skills
- attributes:
 - organised
 - able to maintain an overview
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)	<ul style="list-style-type: none"> • communicating to lead a team, including negotiating and developing reports • communicating verbally, including making presentations, and participating in meetings, questioning and discussions
Collecting, analysing and organising information (2)	<ul style="list-style-type: none"> • tracking, monitoring and control of project communications • applying relevant skills associated with reviewing the project
Planning and organising activities (2)	<ul style="list-style-type: none"> • planning own work and that of project team members
Working in a team (3)	<ul style="list-style-type: none"> • leading and representing the project team • working with others, including external parties/clients and project team members
Using mathematical ideas and techniques (1)	<ul style="list-style-type: none"> • using calculation skills associated with data manipulation involved in project including financial data
Solving problems (3)	<ul style="list-style-type: none"> • applying problem-solving skills as required to address problems arising in managing the project • assisting others to solve problems arising within project
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation • using specific project management software tools • using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none"> • using review process to inform future activity in project management

Products that could be used as evidence include:

- documentation produced in managing projects such as:
 - communications management plans
 - PMIS structure and procedures
 - progress reports
 - records of collection, validation, storage, retrieval, analysis and/or dissemination of information
 - records of meetings
 - post-validation process modifications
 - communications networks
 - records of communications problems and solutions

Processes that could be used as evidence include:

- how information requirements were determined for projects
- how communication plans and associated processes were developed for projects
- how team members were managed throughout projects with respect to communications management within the project
- how information was managed during projects
- how project reporting processes were managed during projects
- how problems and issues with respect to communications and arising during projects were identified and addressed
- how projects were reviewed with respect to communications management
- how improvements to communications management of projects have been acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has managed communications within projects

Integrated competency assessment means:

- this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in project as part of an integrated assessment activity

BSBPM508A Manage project risk

Unit Descriptor This unit specifies the outcomes required to manage risk within a project in order to avoid adverse effects on project outcomes. It covers determining, monitoring and controlling project risks, and assessing risk management outcomes.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A project manager usually performs this function. The functions performed by a program manager to manage risks within multiple projects are addressed in BSBPM608A Direct risk management of multiple projects/programs.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Determine project risks

- 1.1 *Risks* are identified, documented and analysed, in consultation with stakeholders and a higher project authority, as the basis for risk planning
- 1.2 Within *delegated authority*, established *risk management techniques and tools* are used to analyse risks and assess options, and preferred risk approaches are recommended to a higher authority
- 1.3 Plans are developed, agreed with stakeholders, and communicated to ensure clarity of understanding and ongoing management of risk factors
- 1.4 Designated *risk management processes and procedures* are established to enable effective management and communication of risk events, responses and results

2. Monitor and control project risk

- 2.1 Project is managed in accordance with established project and risk management plans to ensure a common approach to the achievement of objectives
- 2.2 Progress is monitored against project plans to identify variances and *recommend responses* to a higher project authority for remedial action
- 2.3 Agreed risk responses are implemented and plans modified to reflect changing project objectives in an environment of uncertainty

3. Assess risk management outcomes

- 3.1 Project outcomes are reviewed to determine effectiveness of risk management processes and procedures

- 3.2 Risk issues and recommended improvements are identified, documented and passed on to a higher project authority for application in future projects

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Risks may be:

- potential
- perceived
- actual
- likely/probable

Delegated authority refers to planning and activities that may:

- be done independently within broad guidance or by taking the lead of a team
- involve consultation with other project members, teams and internal stakeholders
- involve the selection, use and supervision of appropriate risk management methods, tools and techniques
- be conducted routinely or as changing circumstances dictate

Risk management techniques and tools may include:

- calling upon personal experience and/or subject matter experts
- conducting or supervising qualitative and/or quantitative risk analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
- using specialist risk analysis tools to assist in the decision making process

Risk management processes and procedures may include:

- setting key milestones at significant points during the project and at completion
- measurement of actual progress against planned milestones
- recording and reporting of major variance

Recommended responses to variations may be made:

- implementation of risk control trigger mechanisms
- communication with stakeholders, dispute resolution, and modification procedures
- independently or with higher project authority endorsement if necessary
- regularly throughout the project life cycle
- in consultation with project team members, section heads, project manager and stakeholders
- taking into account internal organisational change and external environmental change

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for risks associated with the projects. This will include evidence of managing the work of others within the project team with respect to risk management within the project.

Specific Evidence Requirements

Required knowledge and understanding include:

- broad knowledge and understanding of:
 - uncertainty and the means of its measurement
 - personal attitudes to uncertainty and risk, and how they might affect the project's approach to risk management
 - the place of risk management in the context of the project life cycle
 - appropriate risk management methodologies, their capabilities, limitations, applicability and outcomes

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- risk management
- planning and organising
- communication and negotiation
- problem solving
- leadership and personnel management

- monitoring and review skills
- attributes:
 - attention to detail
 - able to maintain an overview
 - positive leadership
 - analytical
 - organised

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking and monitoring the project
- applying relevant skills associated with reviewing the project

Planning and organising activities (2)

- planning own work and that of project team members

Working in a team (3)

- leading and representing the project team
- working with others including external parties/clients and project team members

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems arising in managing the project
- assisting others to solve problems arising within project

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation
- using specific project management software tools

Innovation skills (2)

Products that could be used as evidence include:

- using assistive technology, if required
- using review process to inform future activity in project management
- documentation produced in managing projects such as:
 - application of lessons learned from previous project(s) in planning a new project
 - lists of potential risk events
 - records of identification and prioritisation of risk events
 - risk management plans
 - reports of variance and recommendations for action
 - details of conduct of risk reappraisal
 - risk management lessons learned

Processes that could be used as evidence include:

- how risks were identified and documented for projects
- how a risk management plan was developed for projects
- how team members were managed throughout projects with respect to risk management
- how risk was managed during projects
- how risks arising during projects were identified and addressed
- how projects were reviewed with respect to risk management
- how improvements to risk management of projects have been acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has managed risks within projects

Integrated competency assessment means:

- that this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in projects

BSBPM509A Manage project procurement

Unit Descriptor

This unit specifies the outcomes required to undertake procurement and contract management within projects. It covers determining procurement requirements, establishing agreed procurement processes, conducting contracting and procurement activities, and managing finalisation processes.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A project manager usually performs this function. The functions performed by a program manager to manage procurement within multiple projects are addressed in BSBPM609A Direct procurement and contracts of multiple projects/programs.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Determine procurement requirements

- 1.1 Procurement requirements are identified, with input from stakeholders and guidance of a higher project authority, as the basis for procurement planning and the contract
- 1.2 Within *delegated authority*, an agreed *procurement management plan* and strategies are established and maintained to ensure clarity of understanding between stakeholders and achievement of project objectives

2. Establish agreed procurement processes

- 2.1 Information is obtained from established sources capable of fulfilling procurement requirements to determine how project objectives can be met
- 2.2 Established selection processes and selection criteria (including OHS requirements) are adopted and communicated to stakeholders and prospective contractors or suppliers to ensure fair competition
- 2.3 Approvals for procurement processes to be used for the project are obtained from a higher project authority to enable formal discussions to be conducted

3. Conduct contracting and procurement activities

- 3.1 Agreed proposals and/or specifications are communicated to prospective contractors or suppliers to ensure clarity of understanding of project objectives

- | | |
|---|--|
| 3.2 | Responses are evaluated and preferred contractors or suppliers are selected in accordance with current legal requirements and agreed selection processes |
| 3.3 | Negotiations are conducted with the preferred contractor or supplier, with guidance of a higher project authority if necessary, to agree on contract terms and conditions, establish common goals and minimise uncertainty |
| 4. Implement the contract and/or procurement | |
| 4.1 | Established procurement management plan is implemented and <i>modifications</i> made with a higher project authority approval to ensure a common approach to achievement of objectives |
| 4.2 | Progress is reviewed and agreed changes are managed to ensure timely completion of tasks, resolution of conflicts and achievement of project objectives within the legal framework of the contract |
| 4.3 | Procurement management problems are identified and reported to a higher project authority, and agreed remedial actions are implemented to ensure project objectives are met |
| 5. Manage contract and procurement finalisation procedures | |
| 5.1 | Finalisation activities are conducted to ensure contract deliverables meet contractual requirements |
| 5.2 | Project outcomes are reviewed using available <i>procurement records and information</i> to determine the effectiveness of contracting and procurement processes and procedures |
| 5.3 | Lessons learned and recommended improvements are identified, documented and passed on to a higher project authority for application in future projects |

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Delegated authority refers to planning and activities that may:

- be done independently within broad guidance or by taking the lead of a team
- involve consultation with other project members, teams and internal stakeholders
- involve the selection, use and supervision of appropriate procurement management methods, tools and techniques
- be conducted routinely or as changing circumstances dictate
- take into account internal organisational change and external environmental change

A procurement management plan identifies and outlines:

- procurement objectives, strategies and timelines
- resources to be obtained against a timeline and budget
- processes to be used for procurement of resources
- responsibilities for staff/team members
- how procurement arrangements are communicated to stakeholders
- the process for monitoring and evaluating procurement related to the project

Modifications may be made:

- independently or with higher project authority endorsement if necessary
- regularly throughout the project life cycle
- in consultation with project team members, section heads, project manager and stakeholders
- taking into account internal organisational change and external environmental change

Procurement records and information may include:

- product specifications
- procurement management plan
- contract documentation
- contractor selection criteria, processes and recommendations
- contract negotiation documentation
- contract change proposals and approvals
- test and acceptance procedures and documentation
- contract discharge and asset disposal register

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility within projects for procurement and contract management. This will include evidence of managing the work of others within the project team with respect to procurement and contract management.

Specific Evidence Requirements

Required knowledge and understanding include:

- broad knowledge and understanding of:
 - the principles of procurement management and their application
 - the principles of contracts and contractual legal requirements from the project management perspective
 - the selection of appropriate formal arrangements and the legal implications of such agreements
 - contract negotiation skills
 - procurement management processes and procedures
 - OHS legislative requirements

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management
- contract management
- planning and organising
- communication and negotiation
- problem-solving
- leadership and personnel management
- negotiation
- monitoring and review skills
- attributes:
 - attention to detail
 - able to maintain an overview
 - thoroughness
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to lead a team, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (2)

- tracking and monitoring the project
- applying relevant skills associated with reviewing the project

Planning and organising activities (2)

- planning own work and that of project team members

Working in a team (3)

- leading and representing the project team
- working with others, including external parties/clients and project team members

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in project including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems arising in managing the project
- assisting others to solve problems arising within project

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation
- using specific project management software tools
- using assistive technology, if required

Innovation skills (2)

- using review process to inform future activity in project management

Products that could be used as evidence include:

- product specifications
- procurement management plans
- contract documentation
- records of evaluation and selection of preferred contractors
- records of involvement in contract negotiations
- progress measurement and conflict resolution process records
- contract change procedures and documentation
- records of test and acceptance procedures and documentation
- records of contract discharge procedures and documentation
- records of procurement lessons learned and recommended improvements

Processes that could be used as evidence include:

- how procurement requirements were identified and documented for projects
- how procurement management plan was developed for projects
- how team members were managed throughout projects with respect to management of procurement within the project
- how procurement was managed during projects
- how procurement problems and issues arising during projects were identified and addressed
- how contract finalisation activities were managed
- how project was reviewed with respect to procurement management
- how improvements to procurement management for projects have been acted upon

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of projects where the candidate has managed procurement within projects

Integrated competency assessment means:

- that this unit should be assessed with other project management units at a Diploma qualification, as applicable to the candidate's management role in projects of

BSBPM601A Direct the integration of multiple projects/programs

Unit Descriptor

This unit specifies the outcomes required to manage the integration of all functions of project management in a program or multiple project context.

This covers managing conflicting priorities between projects, directing project managers in re-aligning projects within the program, directing the internal environment with the needs and expectations of the external environment, and directing projects within the program throughout their life cycle.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage integration within individual projects are addressed in BSBPM501A Manage application of project integrative processes.

It should be noted that conflicting priorities between projects are managed with higher project authority support, in this case project governance committees or senior management.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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
- 2. 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
- 3. 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

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

The project management functions are:

- scope
- time
- cost
- quality
- human resources
- communications
- risk
- procurement

Achievable program objectives may include:

- the client's objectives, for example maximum value for money, or maximum performance at minimum cost
- the supplier/contractor's objectives, for example minimum cost, minimum time and acceptable quality
- end-user(s) objectives, for example maximum performance as well as optional extras
- higher project authorities' objectives (that is, management/projects governance group), for example reputation, retention of market share, buying into market within the constraints of performance, time, cost, quality, resources and skills
- the organisation's objectives, for example quantifiable benefits

The internal project working environment may include:

- physical location of projects within the organisation
- physical location of program project managers, personnel and equipment
- computing support and integrated computer networks
- personal working conditions (physical and emotional)

- teams and interpersonal dynamics
- identity and differentiation of the program's projects within the larger environment

The *external environmental influences* may include:

- the parent organisation, enterprise and/or industry
- employee representative groups, such as unions, professional associations and lobby groups
- political, environmental and societal influences
- public and media interest
- the physical environment, for example geography, ecology and environmental sensitivity
- external stakeholder expectations

Finalisation plans, procedures and activities may include:

- transition of responsibility/ownership of projects' deliverables/products for those projects that concluded in a reporting/management period (such as financial year)
- assessment of stakeholder satisfaction against expectations
- evaluation of projects for benefits derived
- evaluation of projects completed in a reporting period
- review of success/failure criteria for projects completed in a given reporting period
- settling of financial liabilities for projects completed in a consolidated budget context
- forwarding program progress report to higher projects governance authority

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for integrating all project management functions (scope, time, cost, quality, human resources, communications, risk and procurement) within and between projects. This will include evidence of directing the work of project managers and others in the internal and external environment.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the project process, the project life cycle, the relationship between project phases, and interdependencies/relationships between projects
 - program planning and control procedures, resource levelling and rationalisation management and risk management
 - a range of suitable methodologies, techniques and tools available to both project managers and to program managers
 - the need for and application of leadership and management within a project's management environment
 - internal and external environment factors that may affect the program of projects

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project and program management
- high level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)	<ul style="list-style-type: none"> • tracking and monitoring multiple projects • applying relevant skills associated with reviewing multiple projects
Planning and organising activities (3)	<ul style="list-style-type: none"> • planning own work and directing that of project managers
Working in a team (3)	<ul style="list-style-type: none"> • managing project managers • working with others, including external parties/clients and project managers and team members
Using mathematical ideas and techniques (1)	<ul style="list-style-type: none"> • using calculation skills associated with data manipulation involved in projects including financial data
Solving problems (3)	<ul style="list-style-type: none"> • applying problem-solving skills as required to address problems and conflicting requirements arising in managing programs of multiple projects • assisting others to solve problems arising within their projects
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation • using specific project and program management software tools • using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none"> • using review process to inform future activity in the project's management environment
Products that could be used as evidence include:	<ul style="list-style-type: none"> • documentation produced in managing the program/directing projects such as: <ul style="list-style-type: none"> – 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed integration across projects in a program

Integrated competency assessment means:

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM602A Direct the scope of multiple projects/programs

Unit Descriptor	This unit specifies the outcomes required to direct the scope of projects within a program or multiple projects context. It covers the management of authorising projects, and defining, planning and managing the program scope.
Competency Field	<i>Business management services</i>
Domain	<i>Project management</i>
Application of the Competency	<p>A <i>program</i> is defined as a set of interrelated projects, each of which has a project manager. <i>Multiple projects</i> (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).</p> <p>For the purposes of this unit both types will be referred to as a program and managers as program managers.</p> <p>The functions performed by a project manager to manage scope within individual projects are addressed in BSBPM502A Manage project scope.</p>

Element	Performance Criteria
Elements define the critical outcomes of a unit of competency.	The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. <i>Italicised</i> terms are elaborated in the Range Statement.
1. Authorise projects	<p>1.1 <i>Needs</i> are analysed, in consultation with client and other stakeholders if necessary, to justify each project and for the designation of project managers</p> <p>1.2 Project selection and prioritisation are conducted within guidelines provided by, or under direction of, a higher project (governance) authority</p> <p>1.3 <i>Project authorisation recommendations</i> are made to a higher project authority as the basis for future projects management activity and commitment of resources and effort</p>
2. Define and plan program scope	<p>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</p> <p>2.2 Measurable projects' outcomes and benefits are determined and agreed, to enable quantified evaluation of program performance</p> <p>2.3 Scope definition, <i>scope management</i> strategies and plans are developed, agreed and communicated</p>

3. Manage program scope

- 2.4 Program scope is aligned to business requirements and organisational strategy
- 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 to a higher project authority and feedback is provided for application in planning and implementation of later projects within the program

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Needs may be:

- outcome-oriented, for example to fulfil needs
- product-oriented, for example to acquire new computer systems or buildings
- improvement-oriented, for example to find a better ways of doing something
- activity-oriented, for example to stage major sporting events

Project authorisation recommendations may include:

- broad details of required project outcomes and objectives

- recommendations* may include:
- major projects phases, activities and milestones that will require timing coordination across the program (particularly as new approved projects enter the program)
 - project managers' terms of reference, and authorisations and limitations directed by the program manager
 - relationship between multiple project objectives and the programs and therefore strategic objectives of the organisation
- Scope management* may include:
- progressive refinement of scope throughout multiple project life cycles
 - controlling program scope creep, that is incremental increases to scope to accommodate wishes rather than needs
 - managing factors which influence changes to scope
 - determining that a scope change has occurred or is about to occur
 - managing scope changes when they occur
 - managing the effect of scope changes on other areas and on achievement of multiple project objectives
- Project performance* may include:
- measurement of time and resources spent on the projects, as compared to baseline data
 - use of tools and techniques to manage and measure projects' progress in terms of time and resources
- Change management system* may include:
- documentation
 - risk analysis
 - impact analysis
 - configuration management
 - change to control boards/committees
- Scope change reviews* may include:
- major elements of the program liable to change, for example deletion of a line of business endeavour, new projects prioritising program and deletion of poorly performing projects
 - program documentation, including plans, integrated schedules, integrated budgets and integrated (program) risk analysis
 - formal agreements, that is contracts, sub-contracts and memoranda of understanding

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for directing and authorising scoping of the projects. This will include evidence of managing the work of project managers and others working within project teams.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of the place of scope management in the context of a projects delivery environment, particularly the relationship between program scope and:
 - the performance, time, cost and quality of projects
 - the processes of justification and authorisation of projects
 - the importance of scope definition especially during projects start-up, and ongoing throughout the project life cycles
 - the importance of, and techniques related to, project performance measurement and management
 - the importance of, and techniques related to, the definition of multiple projects
 - the impact of balancing and levelling resource requirements for achieving overall organisational objectives
 - the principles of change management and their application
 - appropriate scope management methodologies, techniques and tools, their applicability, capabilities and limitations

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- program management
- high level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring a program of projects
- applying relevant skills associated with reviewing projects
- collating multiple projects' information for business reporting against strategic objectives

Planning and organising activities (3)

- planning own work and that of project managers

Working in a team (3)

- managing the program and key personnel (project managers and business level personnel)
- working with others including external parties/clients

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in projects including financial data

Solving problems (3)	<ul style="list-style-type: none"> • applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program • assisting others to solve problems arising within the program
Using technology (2)	<ul style="list-style-type: none"> • using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation • using specific program management software tools • using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none"> • using review process to inform future activity in program management
Products that could be used as evidence include:	<ul style="list-style-type: none"> • documentation produced in managing the program and directing projects such as: <ul style="list-style-type: none"> – 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 contracts, sub-contracts, 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:	<ul style="list-style-type: none"> • 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed program scope and directed scope across projects

Integrated competency assessment means:

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM603A Direct time management of multiple projects/programs

Unit Descriptor This unit specifies the outcomes required to direct time management across projects, so that key deliverables meet project and program schedules.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage time and scheduling within individual projects are addressed in BSBPM503A Manage project time.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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 allocation 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

2. 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

3. 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 to a higher project authority and feedback is provided for application in planning and implementation of later projects within the program

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Time management may

- be done by taking the lead in a team environment
- involve consultation with project managers and selective involvement of stakeholders
- involve the direction of the use of appropriate time management methods, processes, procedures, tools and techniques
- be conducted non-routinely to meet complex, changing circumstances
- take into account the impact of organisational and environmental change on the program's projects and vice versa

Techniques and tools may include

- using personal experience and/or subject matter experts
- directing qualitative and/or quantitative time analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
- collating and using the products of specialist time analysis to make program-wide time management decisions
- assessing and reporting the potential impact of multiple project timings and their potential for change on the program, and therefore the organisation

Time management plans may include:

- program consolidated schedule
- sub-schedules
- important milestones and critical interdependencies between projects
- alternative schedule management strategies and actions
- formal arrangements
- responsibility assignment
- contingency plans
- assigned schedule management responsibilities

Records may take the form of:

- lists of variances, trends and forecasts of potential schedule events
- Gantt, PERT and other scheduling charts
- diaries, incident logs, occurrence reports and other such documentation
- records of analysis, evaluation of options and selection processes
- records of responses, results and lessons learned
- program and/or organisation files and records

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for managing time and scheduling of the projects. This will include evidence of managing the output of work of others including project managers and a range of stakeholders including higher management.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the principles of program management and its application
 - organisational policies, guidance and attitudes to time management
 - the relationship between time, cost and resources to the project management framework
 - delegation and management of responsibilities for time management
 - direction of project schedules management
 - use of the schedule as a control mechanism
 - appropriate time management and estimating methodologies, techniques and tools, their capabilities and limitations, applicability and outcomes
 - the differences in work content, risk, processes, tools and techniques that apply in the various phases of recurring project life cycles within a volatile program environment

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- program management
- time management and scheduling
- high level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring major milestones of projects
- applying relevant skills associated with reviewing projects and programs

Planning and organising activities (3)

- planning own work and that of project managers

Working in a team (3)

- managing the projects delivery environment, down to project managers and up to a higher authority
- working with others, including external parties/clients
- being the link between expectations of management and the aspirations, constraints and issues of project managers and their teams

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in the program including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program
- assisting others to solve problems arising within projects

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation
- using specific program management software tools
- using assistive technology, if required

Innovation skills (2)

- using review process to inform future activity in program 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 project 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed time and scheduling across multiple projects/programs

Integrated competency assessment means:

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM604A Direct cost management of multiple projects/programs

Unit Descriptor	This unit specifies the outcomes required to analyse, coordinate, and refine the budgets of multiple projects that contribute to an overall program budget. It covers directing project budget development, managing program costs, and directing financial completion of projects.
Competency Field	<i>Business management services</i>
Domain	<i>Project management</i>
Application of the Competency	<p>A <i>program</i> is defined as a set of interrelated projects, each of which has a project manager. <i>Multiple projects</i> (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).</p> <p>For the purposes of this unit both types will be referred to as a program and managers as program managers.</p> <p>The functions performed by a project manager to manage costs within individual projects are addressed in BSBPM504A Manage project costs.</p>

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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

2. 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

3. 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

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Cost estimation may take account of:

- the stage in each project's life cycles
- the availability of information at the time
- contingencies to allow for identified risks and uncertainty
- overhead and profit margin
- government regulations, industry codes of practice and organisational influences

Cost management plans and activities throughout program management may:

- be done independently or by taking the lead in a team environment
- involve consultation with, and selective involvement of, appropriate project stakeholders
- involve the selection, modification and supervision of the use of appropriate cost management methods, processes, procedures, tools and techniques
- be conducted non-routinely to meet complex and changing circumstances
- take into account the impact of organisational and environmental change on the project/program and vice versa

Management of project finances may include:

- approval processes
- financial authorisations/delegations
- invoice procedures
- audit and review
- communication, reports and briefs

Development of cost management systems may involve:

- the application of personal judgement
- the modification of program methodologies and procedures
- cost modelling and estimating
- financial analysis, for example benefit-cost analysis, cash flow analysis, earned value analysis
- program obligation and expenditure forecasting and long-term planning
- authorising and revising financial delegations
- progress and financial change management

Finalisation activities may include:

- comparison of one project's cost management outcomes with success rates of other projects and with overall (organisation) budgetary expectations
- direction of project team managers in their:
 - transition of responsibility/ownership of project deliverables/products
 - transfer of assets to the client or originating owner
 - warranty requirements resolution
 - final audit/reconciliation
 - settling of financial liabilities
 - close-out of account codes and other financial documentation

Records may take the form of:

- records of potential and actual costs
- financial summaries
- budgets, commitment and expenditure
- cost management plans
- reports to a higher authority
- financial charts and graphs
- program and/or organisation files and records
- cost management lessons learned

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for direction of cost management of the inherent projects and for management of the program budget. This will include evidence of managing the work of project managers and those working within the projects' delivery environment.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the principles of program project cost management and its application
 - organisational policies, guidance and attitudes to cost management
 - the relationship of cost, time and resources to the project management framework
 - delegation and management of responsibilities for cost management
 - direction of project development and management of program budgets
 - use of the budget as a control mechanism
 - appropriate cost management and estimating methodologies, techniques and tools, their capabilities and limitations, applicability and outcomes
 - the differences in work content, risk, processes, tools and techniques that apply in the various phases of the recurring project life cycles within a volatile program environment

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- program management
- financial management
- high level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring major cost milestones of projects
- applying relevant skills associated with reviewing projects

Planning and organising activities (3)

- planning own work and that of project managers

Working in a team (3)

- managing the projects delivery environment including being the interface between the business and the requirements of project team managers and their teams
- working with others including external parties/clients

Using mathematical ideas and techniques (2)	<ul style="list-style-type: none">• using calculation skills associated with data manipulation involved in the program, including financial data
Solving problems (3)	<ul style="list-style-type: none">• applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program• assisting others to solve problems arising within projects
Using technology (2)	<ul style="list-style-type: none">• using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation• using specific program management software tools• using assistive technology, if required
Innovation skills (2)	<ul style="list-style-type: none">• using review process to inform future activity in project management
Products that could be used as evidence include:	<ul style="list-style-type: none">• documentation produced in managing program/directing projects such as:<ul style="list-style-type: none">– 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 cashflow 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed costs across multiple projects/programs

Integrated competency assessment means:

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM605A Direct quality management of multiple projects/programs

Unit Descriptor

This unit specifies the outcomes required to direct quality management across multiple projects and within the overall program. It covers directing the development of quality requirements, directing quality assurance management and reviewing and improving the quality of projects and the program.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage quality within individual projects are addressed in BSBPM505A Manage project quality.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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 stakeholders
- 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

2. Direct project 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

3. 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 processes 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

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Quality management may:

- be done independently or by taking the lead in a team environment
- involve consultation with and direction to project managers regarding their selective involvement of appropriate project stakeholders
- involve the overall direction to project managers for the selection, modification and supervision of the use of appropriate quality management methods, processes, procedures, tools and techniques

- be conducted non-routinely to meet complex and changing circumstances
- take into account the impact of organisational and environmental change on the program and vice versa

A quality management system may include:

- ISO 9000 Series or as designed to meet the specific needs of the project

Quality improvement may include:

- formal practices, such as total quality management or continuous improvement
- less formal processes which improve both the product quality and processes of the project, for example client surveys to determine client satisfaction with projects performance

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for quality management of the projects. This will include evidence of managing the work of project managers and those working within the project teams.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the principles of project quality management and their application, and its relation to the organisation's quality management system
 - the need for quality management in the project and its place in the overall organisation
 - the importance of quality in trade-offs with scope, time and cost
 - quality policies and standards applicable in the projects management environment
 - quality management tools, including their capabilities, limitations, applicability and outcomes
 - what are quality outcomes, critical success and failure criteria and quality performance measures

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project management, including delegation skills

- quality management
- client relationship management and client focus
- high level leadership and personnel management
- analytical skills
- communication skills
- planning and organising skills
- maintaining an overview of projects/programs
- attributes:
 - communicative
 - attention to detail/thoroughness
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage complex environments, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring multiple projects
- collating key projects' information for program tracking and reporting
- applying relevant skills associated with reviewing projects outcomes

Planning and organising activities (3)

- planning own work and that of project managers, and the output of a wide range of stakeholders related to the program

Working in a team (3)

- managing the projects delivery environment
- working with others including external parties/clients and project managers

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in the program, including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program

- assisting others to solve issues within projects
- Using technology (2)
- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation
 - using specific program management software tools
- Innovation skills (2)
- using review process to inform future activity in program management
- 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 improvement 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed quality across projects/programs

Integrated competency assessment means:

- this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM606A Direct human resources management of multiple projects/programs

Unit Descriptor This unit specifies the outcomes required to direct human resource organisation and staffing within multiple projects and across the program, to direct project managers in relation to staff performance, and to provide leadership within the program.

Competency Field *Business management services*

Domain *Project management*

Application of the Competency A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage human resources within individual projects are addressed in BSBPM506A Manage project human resources.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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

2. 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 projects 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 projects 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

3. 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

4. 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

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Project organisation and structure may be affected by external influences such as:

- legislation, including anti-discrimination, equal employment opportunity, affirmative action and occupational health and safety
- workplace bargaining
- accepted work practices

Staff may come from:

- within the organisation, such as staff on loan from other programs/projects
- external to the organisation, such as consultants, collaborative or alliance agencies and external authorities

Human resources management methods, techniques and tools may include:

- individual and group competency identification and development
- HRM forecasts, staffing plans and job descriptions
- staff recruitment and reallocation
- performance monitoring, assessment and reporting
- conflict resolution

HRM development and training may be formal or informal, and may include:

- project management
- general management
- project administration, for example computer applications, filing systems
- specialist/professional skills and career progression
- interpersonal communications
- team building and group activities

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for human resources management of the projects. This will include evidence of 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.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the importance of human resources management in the project management environment
 - policies, standards and methods required to achieve HRM outcomes
 - the use of HRM selection, assignment, training, performance evaluation and motivation tools, including their capabilities, limitations, applicability and outcomes
 - the conflict and stress issues associated with individuals managing projects especially within a human resource matrix management environment
 - HRM outcomes, critical success and failure criteria and HRM performance measures
 - the application of interpersonal skills
 - assessment of interpersonal strengths and weaknesses
 - application of relevant strategies, for example leadership, decision making, group dynamics, change management, learning/coaching
 - the differences in work content, processes and risk that affect HRM requirements in the various phases of the project life cycle

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- program and project management
- human resources management
- high level management and leadership
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring key milestones of multiple projects
- applying relevant skills associated with reviewing outcomes of multiple projects

Planning and organising activities (3)

- planning own work and that of project managers

Working in a team (3)

- managing the program delivery environment
- working with others, including external parties/clients and project managers

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in the program, including financial data

- Solving problems (3)
- applying problem-solving skills as required to address problems and conflicting requirements arising across the program
 - authorising issues resolution arising within projects

- Using technology (2)
- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of project activities, financial reporting and data collation
 - using specific program management software tools
 - using assistive technology, if required

- Innovation skills (2)
- using review process to inform future activity in program management

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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has directed human resources management across projects

Integrated competency assessment means:

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM607A Direct communications management of multiple projects/programs

Unit Descriptor

This unit specifies the outcomes required to provide the critical link between people, ideas and information at all stages in the life-cycles of multiple projects across a program.

It covers directing project communications and information management, managing program communications and analysing communications management outcomes for projects and programs.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage communications within individual projects are addressed in BSBPM507A Manage project communications.

Element

Performance Criteria

Elements define the critical outcomes of a unit of competency.

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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

2. 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

3. 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

4. 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

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Communications management plans and activities by a program manager may:

- be done independently or by taking the lead in a multiple teams environment
- involve consultation with project managers and selective involvement of appropriate project stakeholders
- involve the selection, modification and supervision of appropriate communications management methods, processes, procedures and tools
- be conducted non-routinely to meet complex, changing circumstances
- take into account the impact of organisational and environmental change on the program and vice versa

The project management information system (PMIS) may include:

- networks structure, processes and procedures for storage and communication of information
- individual and group authority and responsibilities
- hierarchy of decision making responsibility/authority
- limitations and restrictions on subject matter and methods of communication
- types, responsibilities, distribution and regularity of reports, as well as follow-up procedures

Information validation processes may be influenced by the:

- age of the information
- level of detail of information (too much or too little)
- language (translated or converted data may need special attention)
- changes to standards, regulations or limits since information was compiled
- degree of exposure to mis-information and dis-information
- potential impact of the information on the program outcome
- cost of the validation process

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across multiple projects or a program for communications management of the projects. This will include evidence of managing others' work including project managers and a range of stakeholders within, and external to, the organisation.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the principles of communications management and their application
 - the importance of communications at all levels and at all times within the program, the organisation and the external environment
 - the establishment and maintenance of structured communication networks in a rapidly evolving technological environment involving computer-based, interpersonal and media-based methods of communication
 - appropriate communication management technologies; their capabilities, limitations and applicability
 - the contribution of communications to program and organisational outcomes
 - aggregating, commenting on, endorsing and forwarding reports to organisational management
 - feedback to multiple project teams

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- program management and delegation skills
- high level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- attributes: communication and positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage a complex projects delivery environment, including negotiating, developing reports and conducting meetings
- communicating verbally, including making presentations, chairing steering group meetings and questioning and discussing

Collecting, analysing and organising information (3)

- tracking and monitoring major outcomes and interdependencies of multiple projects
- applying relevant skills associated with reviewing projects' outcomes

Planning and organising activities (3)

- planning own work and that of project managers

Working in a team (3)

- managing the projects delivery/program environment
- working with others including external parties/clients and project managers

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in projects, including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program
- assisting others to solve problems arising within the program

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation
- using specific program management software tools
- using assistive technology, if required

Innovation skills (2)

- using review process to inform future activity in program management

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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed communications across projects

**Integrated competency
assessment means:**

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM608A Direct risk management of multiple projects/programs

Unit Descriptor

This unit specifies the outcomes required to manage the factors that might adversely affect multiple projects, the program and organisational outcomes. It covers directing the planning and management of project risks, managing risks to the overall program, and assessing risk management outcomes for the program and the organisation.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage risk within individual projects are addressed in BSBPM508A Manage project risk.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. Direct planning of project risk management

- 1.1 Potential, perceived and actual risk events are directed 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 |
| 2. 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 |
| 3. 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 |

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Risk management planning may:

- be done independently or by taking the lead in a multiple projects team environment
- involve consultation with project managers and with selective involvement of stakeholders within and external to the organisation
- involve the selection, modification and direction of the use of appropriate risk management methods processes, procedures, tools and techniques
- be conducted substantially non-routinely to meet complex and changing circumstances

Risk management methods, techniques and tools may involve:

- take into account the impact of organisational and environmental change on the program and vice versa
- calling upon personal experience and/or subject matter experts
- conducting or directing qualitative and/or quantitative risk analysis, such as schedule simulation, decision analysis, contingency planning and alternative strategy development
- collating and using the products of specialist risk analysis to make program-wide risk management decisions
- assessing and reporting the potential impact of multiple projects risk on the organisation

Risk management plans may include:

- potential risk events
- preferred and alternative risk management strategies and actions
- OHS risks
- formal arrangements
- responsibility assignment
- contingency plans
- assigned risk responsibilities

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility for risk management across multiple projects or a program. This will include evidence of managing the work of others including project managers and a range of stakeholders and contributing agencies both within and beyond the organisation.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - uncertainty and the means of its measurement
 - organisational policies, guidance and attitudes to risk management
 - personal attitudes to uncertainty and risk, and how they might impact on the program's and organisation's approach to risk management

- the place of project risk management in the context of the project life cycle and other project management functions
- appropriate project risk management methodologies, their capabilities, limitations, applicability and outcomes
- the differences in work content, risk, processes, tools and techniques that apply in the various phases of the project life cycle and of the program cycle and how these relate to business cycles, particularly financial

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- program management
- project risk management
- high-level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring multiple projects across the program

organising information (3)	<ul style="list-style-type: none">• applying relevant skills associated with reviewing projects in a program and a program-to-organisation context
Planning and organising activities (3)	<ul style="list-style-type: none">• planning own work and that of project managers and a range of stakeholders both within and external to the organisation
Working in a team (3)	<ul style="list-style-type: none">• managing multiple project teams in a projects delivery (program) environment• working with others, including external parties/clients and project managers
Using mathematical ideas and techniques (1)	<ul style="list-style-type: none">• using calculation skills associated with data manipulation and interpretation involved in the program including quantitative risk (statistical) analysis
Solving problems (3)	<ul style="list-style-type: none">• applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program, particularly resolving cost of treatment versus consequence of failure equations for individual projects• assisting others to solve problems arising within the program
Using technology (2)	<ul style="list-style-type: none">• using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation• using specific program management software tools
Innovation skills (2)	<ul style="list-style-type: none">• using review process to inform future activity in program management
Products that could be used as evidence include:	<ul style="list-style-type: none">• documentation produced in managing program/projects such as:<ul style="list-style-type: none">– 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed risk across projects/programs

Integrated competency assessment means:

- that this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs

BSBPM609A Direct procurement and contracts of multiple projects/programs

Unit Descriptor

This unit specifies the outcomes required to direct the management of contracting activities across projects and programs. It covers setting up the contracting process, directing the management of contract and procurement processes, and finalising contracts for projects across the program.

Competency Field

Business management services

Domain

Project management

Application of the Competency

A *program* is defined as a set of interrelated projects, each of which has a project manager. *Multiple projects* (sometimes referred to as a portfolio of projects) means a number of projects which may or may not be related but which are all managed by the same person as a program to achieve a common organisational objective(s).

For the purposes of this unit both types will be referred to as a program and managers as program managers.

The functions performed by a project manager to manage procurement within individual projects are addressed in BSBPM509A Manage project procurement.

It should be noted that conflicting priorities between projects are managed with higher project authority support, in this case project governance committees or senior management.

Element

Elements define the critical outcomes of a unit of competency.

Performance Criteria

The Performance Criteria specify the level of performance required to demonstrate achievement of the Element. *Italicised* terms are elaborated in the Range Statement.

1. 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

2. 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
- 3. 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
- 4. 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 from available *records* and information, and variance is directed for analysis and changes are agreed for implementation
- 4.3 Project managers are directed 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
- 5. 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

Range Statement

The Range Statement adds definition to the unit by elaborating critical or significant aspects of the performance requirements of the unit. The Range Statement establishes the range of indicative meanings or applications of these requirements in different operating contexts and conditions. The specific aspects which require elaboration are identified by the use of italics in the Performance Criteria.

Legislation, codes and national standards relevant to the workplace which may include:

- award and enterprise agreements and relevant industrial instruments
- relevant legislation from all levels of government that affects business operation, especially in regard to Occupational Health and Safety and environmental issues, equal opportunity, industrial relations and anti-discrimination
- relevant industry codes of practice

Procurement strategies, methods and management plans may include:

- contract performance plans and an associated performance monitoring processes
- contractor and sub-contractor responsibilities, controls and reporting relationships
- procurement, test and acceptance procedures and payment schedules
- conflict resolution processes
- explanatory information (for example background, restrictions or expectations) relating to special terms and conditions planning for long lead-time items and critical program components, and transition plans

Proposals may take the form of:

- tenders
- submissions
- quotations
- expressions of interest

Records may take the form of:

- product specifications
- procurement management plans
- contract analysis, evaluation of options and strategy development
- contractor identification, evaluation and selection records
- contract negotiation documentation, for example contract negotiation strategies, plans, team and individual directives
- progress measurement and conflict resolution process records
- development and management of contract change procedures
- test and acceptance procedures
- contract discharge procedures and outcomes
- procurement management lessons learned

Evidence Guide

The Evidence Guide provides advice to inform and support appropriate assessment of this unit. It contains an overview of the assessment requirements followed by identification of specific aspects of evidence that will need to be addressed in determining competence. The Evidence Guide is an integral part of the unit and should be read and interpreted in conjunction with the other components of competency.

Assessment must reflect the endorsed Assessment Guidelines of the parent Training Package.

Overview of Assessment Requirements

A person who demonstrates competence in this unit must be able to provide evidence that they have taken responsibility across the multiple projects or a program for direction of contract and procurement management. This will include evidence of managing the work of others, including project managers.

Specific Evidence Requirements

Required knowledge and understanding include:

- a detailed knowledge and understanding of:
 - the principles of contract and procurement management and their application
 - the principles of contracts and contractual legal requirements from the project and program management perspective
 - contract types, their capabilities, limitations, applicability and outcomes
 - personal and team oriented contract negotiation skills
 - contract and procurement management processes and procedures

Required skills and attributes include:

- ability to relate to people from a range of social, cultural and ethnic backgrounds, and physical and mental abilities
- project and program management
- high-level leadership and personnel management
- analytical skills
- communication skills
- planning and organising
- maintaining an overview of projects/programs
- delegation
- attributes:
 - communicative
 - thoroughness
 - positive leadership

Key competencies or generic skills relevant to this unit

The seven key competencies represent generic skills considered essential for effective work participation. Innovation skills represent a further area of generic competence. The bracketed numbering indicates the performance level required in this unit:

Level (1) represents the competence to undertake tasks effectively

Level (2) represents the competence to manage tasks

Level (3) represents the competence to use concepts for evaluating and reshaping tasks

The bulleted points provide examples of how the key competencies can be applied for this unit

Communicating ideas and information (3)

- communicating to manage teams, including negotiating and developing reports
- communicating verbally, including making presentations, and participating in meetings, questioning and discussions

Collecting, analysing and organising information (3)

- tracking and monitoring major outcomes of projects and therefore the program against organisational objectives
- applying relevant skills associated with reviewing multiple projects and the program

Planning and organising activities (3)

- planning own work and that of project managers and stakeholders within/beyond the organisation

Working in a team (3)

- managing project teams in a projects delivery/program environment
- working with others including external parties/clients and project managers

Using mathematical ideas and techniques (1)

- using calculation skills associated with data manipulation involved in the program, including financial data

Solving problems (3)

- applying problem-solving skills as required to address problems and conflicting requirements arising in managing the program
- assisting others to solve problems arising within the program

Using technology (2)

- using word processing packages, spreadsheets, databases and other packages to produce written correspondence and reports of program activities, financial reporting and data collation
- using specific program management software tools
- using assistive technology, if required

Innovation skills (2)

- using review process to inform future activity in program management

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 requirements 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

Resource implications for assessment include:

- access to workplace documentation

Validity and sufficiency of evidence requires:

- that where assessment is part of a learning experience, evidence will need to be collected over a period of time, involving both formative and summative assessment
- examples of where the candidate has managed procurements and contracts across projects/programs

Integrated competency assessment means:

- this unit should be assessed with other project management units at an Advanced Diploma qualification, as applicable to the candidate's management role in projects/programs