

## Core Unit 4: BSBPMG510A: Manage projects

This Unit describes the performance outcomes, skills and knowledge required to manage a straightforward project or a section of a larger project. This Unit addresses the management of projects including the development of a project plan, administering and monitoring the project, finalising the project and reviewing the project to identify lessons learnt for application to future projects. No licencing, legislative, regulatory or certification requirements apply to this unit.

**References:** Course manual, Chs. 3, 5; Sport and Recreation Victoria, 1995, section 3; Dwyer, J. and Hopwood, N., 2010, Ch. 6, 7, 8

Unit Element	Performance Criteria	Study Program	References	Assessment Criteria	Work Evidence
1. Define project	1.1 Access project scope and other relevant documentation	<ol style="list-style-type: none"> <li>Read chapter 3 of this manual and identify and summarise the relevant pre-planning stages of a recreation planning project</li> <li>Define the range of the other types of reports which need to be consulted? (See Ch 5)</li> <li>Either               <ol style="list-style-type: none"> <li>review a previous recreation planning study report you have identified and determine whether it has reviewed other reports and studies. If so, what types of reports have been reviewed, how have they been reviewed and what use is made of the information contained in them? How could the use of the reports be improved? or</li> <li>Identify and review two reports relevant to a recreation planning study you might undertake and evaluate how the information in them might assist you with the new study</li> </ol> </li> </ol>	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer, & Hopwood, 2010, Ch. 6, 7, 8	<p>Students will demonstrate the ability to:</p> <ol style="list-style-type: none"> <li>List and explain the importance of relevant pre-planning stages of a recreation planning project</li> <li>Prepare a written report that either               <ol style="list-style-type: none"> <li>Reviews an existing recreation planning study report that has reviewed other reports and studies. The review should present a discussion of (1) what types of reports have been reviewed, (2) what is covered in the review (3) what use is made of the information and (4) how the use made of the reports could be improved, or</li> <li>Identifies and reviews one report which are relevant to a recreation planning study the student might undertake and evaluate how the information in them might assist with the new planning study</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>Provision of a list of pre-planning stages and text explaining their importance</li> <li>A review of an existing recreation planning study with a listing on (1) what types of reports have been reviewed, (2) what is covered in the review (3) what use is made of the information and (4) how the use made of the reports could be improved, or</li> <li>A review of one report relevant to a recreation planning study in/for the student's selected organisation that evaluates how the information in the report would/ could assist with the new planning study</li> </ol>
	1.2 Define project stakeholders	<ol style="list-style-type: none"> <li>Read section 3.2 and Ch 8 of the course manual. Who are the stakeholders in a recreation planning study? Why do they need to be consulted and what are the differing types of information different stakeholders can provide?</li> <li>Draw up a Table of stakeholder consultations for a project you are/have worked on indicating who they stakeholders are, how you will consult them, and the types of information you will collect from each consultative method</li> </ol>	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer, & Hopwood, 2010, Ch. 6, 7, 8	<p>Students will demonstrate the ability to:</p> <ol style="list-style-type: none"> <li>Prepare a chart which lists               <ol style="list-style-type: none"> <li>the proposed range of the stakeholders who might be consulted in a recreation planning study</li> <li>how each will be consulted, and</li> <li>the types of information to be collected through each consultative method</li> </ol> </li> </ol>	<ol style="list-style-type: none"> <li>A chart listing of stakeholders who might be consulted in a planning study together with an indication of how they might most appropriately be consulted</li> <li>A chart listing consultative methods together with an indication of the types of information that each method is most and least effective in collecting</li> </ol>

	1.3 Seek clarification from delegating authority of any issues related to project and project parameters		Manual, Ch. 3		
	1.4 Identify limits of own responsibility and reporting requirements	1. Why is it important to define in writing the limits of a recreation planner's responsibility and reporting requirements?	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer, & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Explain why it is important to define in writing the limits of a recreation planner's responsibility and reporting requirements 2. Refer to the opinion of relevant legal and/or OH&S officers in their response	1. A written or verbal statement explaining why is it important to define in writing the limits of a recreation planner's responsibility and reporting requirements eg: due to seniority and responsibility; for insurance purposes; to define responsibilities as a basis for performance assessments
	1.5 Clarify relationship of project to other projects and to the organisation's objectives	1. Identify other projects which are planned or underway within the organisation which have potential relevance to your project. Define ways by which synergies can be developed between the projects which will further the outputs (and hopefully, the outcomes) of each 2. Locate a copy of your Council's/ other organisation's strategic plan and policies document. Assess the philosophy, scope and intent of these documents from a recreation provision perspective or from the perspective of the objectives established for a specific recreation planning project. How would you describe the correlation or synergies between them? Rewrite the recreation philosophy, scope and intent to conform with the Council/organisational policy (or vice versa as you see appropriate). 3. Where you have identified a lack of "sympathy" between the recreation and Council/organisational policies, what concrete actions might be taken to achieve a greater alignment between them?	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Identify and list other projects which are planned or underway within the selected organisation which have potential relevance to their project 2. Define ways by which synergies can be developed between the projects which will further the outputs and the outcomes of each 3. Discuss the benefits of establishing a philosophical relationship (eg: vision/ mission, objectives) between their selected organisation's strategic plans and policies and those established for a specific recreation planning project 4. Outline the selected organisation's strategic plans and policies and then write a vision/mission, goal and objectives for a recreation plan that conforms with the Council/ organisational policy or 5. Where a lack of "sympathy" is identified between existing recreation and Council/organisational policies, draft a revision of either or both to achieve a greater alignment between them	1. A listing of other projects which are planned or underway within the selected organisation which have potential relevance to their project eg: health plan, transport plan, open space plan, community services plan, aged care plan, residential development plan 2. A chart listing three other plans identified and explaining how synergies can be developed between the projects which will further the outputs and the outcomes of each 3. A written or verbal statement describing the benefits of establishing a philosophical relationship (eg: vision/ mission, objectives) between the selected organisation's strategic plans and policies and those established for a recreation planning project 4. A written summary of an organisation's strategic plans and policies and a written vision/mission, goal and objectives for a recreation plan that reflects the wider Council statements OR 5. A written revision of the selected organisation's strategic plans and policies and those for a recreation plan

	1.6 Determine and access available resources to undertake project	See 1.5 of Core Unit 3: BSBMGT515A: Manage operational plan	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: <ol style="list-style-type: none"> <li>1. Prepare a statement outlining the stages of work that might be considered for implementing in preparing a recreation plan</li> <li>2. Describe the resource needs for a recreation plan</li> <li>3. Describe the specialist inputs that might be sought to ensure an effective planning process and how those specialists might continue to be involved with the planning study</li> </ol>	<ol style="list-style-type: none"> <li>1. A list that records the stages of work to be considered when preparing a recreation plan</li> <li>2. An explanatory statement of the resource needs for a recreation plan eg: funding (and amount), qualified staff, inventories of facilities, programs and services; meeting venues</li> <li>3. A list of specialists who may be involved together with a statement of their key inputs and how they might be used during the continuation of a planning study eg: landscape architects, demographers, social /youth workers. Initial inputs would be factual whereas later inputs could be of a review and evaluative form</li> </ol>
2. Develop project plan	2.1 Develop project plan including timelines, work breakdown structure, role and responsibilities and other details of how the project will be managed in relation to the project parameters	<ol style="list-style-type: none"> <li>1. Prepare a project plan for your selected project and explain the rationale for each of the components</li> <li>2. List the management tools you will use in the course of the project</li> <li>3. Prepare a time line for the project</li> </ol>	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: <ol style="list-style-type: none"> <li>1. Prepare a project plan for your selected project and explain the rationale for each of the components</li> <li>2. List the management tools they will use in the course of the project</li> <li>3. Prepare a time draft/hypothetical line for the project</li> </ol>	<ol style="list-style-type: none"> <li>1. Provision of a project plan showing timelines, work breakdown, roles and responsibilities and an explanation of why each component is being used</li> <li>2. A listing of management tools to be used eg: team meetings; review of the quality of inputs; reporting to steering group, preparation of draft materials, community, elected members, external review</li> </ol>
	2.2 Identify and access appropriate project management tools	<ol style="list-style-type: none"> <li>1. Prepare a list of the project management tools identified through reading and through investigations in the place of work/selected agencies and rank these from 1-5 in terms of their usefulness in progressing a planning study. Discuss your ranking with your group or external mentor and revise your list as deemed appropriate as a result</li> </ol>	Manual, Chs. 3, 5 SRV 1995, sect. 3 Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: <ol style="list-style-type: none"> <li>1. Prepare a list of the project management tools identified through your reading and through investigations in their place of /selected agencies</li> <li>2. Rank the project management tools from 1-5 in terms of their usefulness in progressing a planning study</li> <li>3. Students to record the outcomes of discussions of the ranking with their within-group or external mentor and any revisions to the list as deemed appropriate as a result</li> </ol>	<ol style="list-style-type: none"> <li>1. A ranked listing of management tools in terms of their usefulness in progressing a planning study together with an explanation of the use of each of them</li> <li>2. A written or verbal record of a discussion of the ranking of planning project management tools with other professionals and of any revisions to the list as a result</li> </ol>

	2.3 Formulate risk management plan for project including OH&S	<ol style="list-style-type: none"> <li>1. Review a copy of your organisation's risk management and occupational health and safety plans and identify any areas which might be of concern when conducting a recreation planning study</li> <li>2. Seek advice on the issues of concern from your organisation's OH&amp;S officer and where the concern is confirmed, determine a strategy for eliminating the risk</li> </ol>	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	<p>Students will demonstrate the ability to:</p> <ol style="list-style-type: none"> <li>1. Prepare a summary of their organisation's risk management and occupational health and safety plans</li> <li>2. Identify any areas which might be of concern when conducting a recreation planning study and explain the professional advice given on these</li> <li>3. List strategies for managing the risks identified</li> </ol>	<ol style="list-style-type: none"> <li>1. A written summary of an organisation's risk management and occupational health and safety plans</li> <li>2. A listing of risk management and occupational health and safety issues that might be of concern when conducting a recreation planning study together with an explanation of professional advice that was sought to on how to manage them</li> </ol>
	2.4 Develop and approve project budget	<ol style="list-style-type: none"> <li>1. Prepare an indicative budget for each of the components you have included in the project plan in 2.1 (1)</li> </ol>	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8; Banks & Giliberti, Ch. 1, 4; Kemp & Dunbar, Ch. 5	<p>Students will demonstrate the ability to:</p> <ol style="list-style-type: none"> <li>1. Identify the components to be included in a real or hypothetical recreation planning project</li> <li>2. Define and justify the proposed time allocation to each component and other time allocations, for management, officer presentations, reviews, revisions etc</li> <li>3. Prepare and explain a draft budget for the project</li> </ol>	<ol style="list-style-type: none"> <li>1. A written record of a real or hypothetical budget for a recreation planning project together with an explanation of the proposed time allocation to each component</li> </ol>
	2.5 Consult team members and take their views into account in planning the project	<ol style="list-style-type: none"> <li>1. Understand the value of and define a process for consulting with team members</li> </ol>	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	<p>Students will demonstrate the ability to:</p> <ol style="list-style-type: none"> <li>1. Explain why team members should be consulted when preparing and undertaking a recreation planning study</li> <li>2. Define a process for consulting with team members and for incorporating responses into the planning process</li> </ol>	<ol style="list-style-type: none"> <li>1. A written explanation of why team members should be consulted when preparing and undertaking a recreation planning study eg: to gain useful feedback, to gain colleague support, to ensure team members the reasons for the strategies used, to ensure team members understand their responsibilities, to avoid OH&amp;S issues and problems</li> <li>2. A written or verbal explanation of a process that will be used for consulting with team members and for incorporating responses into the planning process</li> </ol>

	2.6 Finalise project plan and gain any necessary approvals to commence project according to documented plan	1. Review answers to 1.6 (1) of Core Unit 3: BSBMGT515A: Manage operational plan	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: <ul style="list-style-type: none"> <li>1. Show evidence of researching the approvals processes that have been adopted by their selected organisation or another organisation (eg: a university) to ensure (a) the validity of the research undertaken and (b) the confidentiality of information collected from participants</li> <li>2. Review of the scope of the approvals process and discuss how it helps and potentially, hampers research</li> <li>3. Provide suggestions as to how the approvals process that is reviewed could be improved</li> <li>4. If the approvals process studied is not from their selected organisation, discuss which elements might be appropriate for adoption by it and why</li> </ul>	<ul style="list-style-type: none"> <li>1. Summarise, and provided documents related to the researching the approvals processes used by their selected organisation or by another organisation</li> <li>2. Provide a written or verbal review of the scope of the approvals process and discuss how it can help and potentially, hamper research</li> </ul>
3. Administer and monitor project	3.1 Take action to ensure project team members are clear about their responsibilities and the project requirements	1. Read Section 3.2 and explain how you can make clear team members are certain as to their responsibilities and the project requirements	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: <ul style="list-style-type: none"> <li>1. Outline a strategy to make clear to team members what their responsibilities and the project requirements</li> </ul>	<ul style="list-style-type: none"> <li>1. A written statement explaining how a team leader can ensure project team members are clear about their responsibilities and the project requirements eg: by preparing statements of responsibilities, the types of actions required, deadlines for actions, lines of reporting</li> </ul>
	3.2 Provide support for project team members, especially with regard to specific needs, to ensure that the quality of the expected outcomes of the project and documented time lines are met	1. Identify strategies by which a project manager can provide productive, positive support for team members. Assess which are regularly applied within your organisation and which should be used more often	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: <ul style="list-style-type: none"> <li>1. List and explain a number of strategies by which a project manager can provide productive, positive support for team members</li> <li>2. Report on any evidence from within their selected organisation that demonstrates that support mechanisms are or are not in place. Where they are not in place, suggest strategies for implementing them</li> </ul> <p>Include part 5.2</p>	<ul style="list-style-type: none"> <li>1. A listing and discussion of strategies by which a project manager can provide productive, positive support for team members eg: allocating individual and achievable tasks, reviewing work in progress, team member mentoring, instituting regular project review meetings</li> <li>2. Identify and describe work situations in which support mechanisms are not in place and how the deficiencies might be overcome eg: where a team does not exist, create a team; where there is team conflict, institute a review process; where team members do not appear to be managing their tasks, initiate task sharing</li> </ul>

	3.3 Establish and maintain required record keeping systems throughout the project	1. Establish and maintain record keeping system throughout a recreation planning project	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Outline the findings of a discussion with their course mentor on if and how a record of the planning process might be established and maintained 2. Provide a list of information on which records might be kept and devise a system for recording that information in the course of a recreation planning project	1. A verbal or written report on discussions with course mentor regarding record keeping systems and procedures used or not use throughout a recreation planning project 2. A listing of information, issues or other items on which records should be kept eg: contact from and with other officers, Councillors, the community; hours spent on individual tasks; information distributed to other officers, Councillors, the community
	3.4 Implement and monitor plans for managing project finances, resources (human, physical and technical) and quality	1. Identify a planning project (not necessarily a <i>recreation</i> planning project) undertaken in your planning organisation. Outline the steps undertaken to help ensure the effective management of the financial, human and technical resources involved 2. Review and evaluate the steps applied and identify ways by which they could be improved	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Outline the steps that were undertaken during a planning project they have identified to help ensure the effective management of the financial, human and technical resources involved 2. Provide an evaluation of the steps taken and outline how they might be added to or improved	1. A written of the steps that should/ could be taken in an organisation to ensure the effective management of the financial, human and technical resources involved in a planning project 2. An evaluation of the steps actually taken and how these could be added to and/or improved
	3.5 Complete and forward project reports as required to stakeholders	1. Use a case study from within your organisation to explain how these tasks can be undertaken in the most effective manner	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Use a case study from within their selected organisation to explain how a project report was completed and forwarded to stakeholders 2. Provide suggestions as to how the process used could be improved	1. A written or verbal report explaining how a project report was completed and forwarded to stakeholders eg: via a presentation to officers and Councillors; via a draft report released prior to a public review meeting; via press releases; via web releases; via summary material
	3.6 Undertake risk management as required to ensure project outcomes are met	1. See 2.3 above	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8; Banks & Giliberti, Ch. 5.8; Kemp & Dunbar, Ch. 9	Students will demonstrate the ability to: 1. Prepare a summary of their organisation's risk management and occupational health and safety plans 2. Identify any areas which might be of concern when conducting a recreation planning study and explain the professional advice given on these 3. List strategies for managing the risks identified	1. See 2.3 above

	3.7 Achieve project deliverables	1. Outline the evidence you should be able to present to your employer to demonstrate that you have achieved the project deliverables	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8; Banks & Giliberti, Ch. 5.8; Kemp & Dunbar, Ch. 9	Students will demonstrate the ability to: 1. Outline the evidence that it is considered should be presented to employers to demonstrate that they have achieved the project deliverables 2. Research and explain the project documentation and sign offs needed to effectively conclude a project	1. A listing of "deliverables" eg: completed study report accepted and/or adopted by Council; completion of collection and review of comments and responses from stakeholders; finalisation of payments/expenses associated with the project; inclusion of action on project in annual budget; initiation of program, service of facility development; monitoring of use and achievement of desired outcomes in terms of use levels, user mix, benefits received, financial performance, improved resident rating of performance of planning organisation
4. Finalise project	4.1 Complete financial record keeping associated with project and check for accuracy	1. Within 3.3 and 3.4 above	Banks & Giliberti, Ch. 5.8; Kemp & Dunbar, Ch. 9	Within 3.3 and 3.4 above	
	4.2 Assign staff involved in project to new roles or reassign to previous roles	1. Outline some of the difficulties faced in reallocating internal staff once a planning study has been completed	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Present evidence of discussions with human resources officers and their course mentor regarding difficulties faced in reallocating internal staff once a planning study has been completed and how these might be minimised	1. Written report on discussions with human resources officers and course mentor regarding difficulties faced in reallocating internal staff once a planning study has been completed and how these might be minimised
	4.3 Complete project documentation and obtain any necessary sign offs for concluding project	1. As part of 3.7 above	Manual, Ch. 12	As part of 3.7 above	
5. Review project	5.1 Review project outcomes and processes against the project scope and plan	1. Explain why it is important to review project outcomes and processes against the project scope and plan 2. Define over what time spans might the review and evaluation process take place?  Include 5.3	Manual, Chs. 3, 5, 12.7; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Explain why it is important to review project outcomes and processes against the project scope and plan 2. Propose a time spans during which a the review and evaluation process might take place	1. Brief listing and discussion of why it is important to review project outcomes and processes against the project scope and plan eg: to identify possible areas of failure to achieve desired outcomes; as an input to future projects; to identify strengths and weaknesses in use of staff; to evaluate staff performance

	5.2 Involve team members in the project review	1. Explain why it is important to involve team members in the project review As part of 3.2	Manual, Chs. 3, 5; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Explain why it is important to involve team members in the project review 2. Indicate ways in which team members can be involved in a project review	
	5.3 Document lessons learnt from the project and report within the organisation	1. Locate an existing format or use a literature search to devise a framework for documenting the findings of a review of the processes, outputs and outcomes of a planning study See 5.1	Manual, Chs. 3, 5, 12.7; SRV 1995, sect. 3; Dwyer & Hopwood, 2010, Ch. 6, 7, 8	Students will demonstrate the ability to: 1. Report on their research into existing formats and/or literature searches into a framework for documenting the findings of a review of the processes, outputs and outcomes of a planning study	