

Business Services Training

Unit of Competency

Administer Projects
BSBADM407B

Unit Descriptor

This unit describes performance outcomes, skills and knowledge required to perform the activities associated with the administrative aspects of a project, such as measurement, monitoring, reporting, and winding up the project on completion.

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Employability Skills

This unit contains employability skills.

Application of the Unit

The unit focuses on the administration requirements within any project undertaken under the supervision of an experienced project manager. The administrative skills are applied within the context of a project environment.

The unit does not apply to project managers or specialist project managers. For specialist project managers, the units of competency in the Project Management competency field will be applicable.

Competency field

Administration – General Administration

**SUITABLE
FOR
BSBADM407**

Administer Projects

This book supports and BSBADM407B Administer Projects in the BSB07 Business Services Training Package.

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Performance Criteria

Unit Competencies

Competency Element Elements describe the essential outcomes of a unit of competency.	Performance Criteria Performance Criteria describe the required performance needed to demonstrate achievement of the Element. Where italicised text is used, further information is detailed in the Required Skills and Knowledge and/or Range Statement. Assessment of performance is to be consistent with the Evidence Guide.
1 Plan project administration	1.1 Identify and record the purpose, scope and objectives of <i>projects</i>
	1.2 Develop project plans identifying project activities and <i>key administrative milestones</i> and timelines in accordance with the <i>requirements of the project brief/contract</i> and in consultation with stakeholders
	1.3 Identify and address factors that affect timeframes in project planning to ensure timeframes are realistic and achievable
	1.4 Link project budgets to key outcomes within projects and incorporate reporting mechanisms to ensure payments are made / received as outcomes are achieved
	1.5 Identify <i>monitoring and reporting arrangements</i> for project activities and budgets within project plans in accordance with organisational, statutory and auditing requirements
2 Coordinate project administration	2.1 <i>Allocate</i> and monitor tasks and resources in accordance with project requirements
	2.2 Detail project <i>expenditure</i> in financial control systems, and monitor against project budgets in accordance with project plan
	2.3 <i>Monitor</i> project timeframes and milestones and report to designated person/s in accordance with organisational requirements
	2.4 Maintain project records in accordance with project and organisational requirements
3 Finalise and review project administration	3.1 Identify and complete <i>procedures for winding up projects</i> in accordance with statutory, organisational and auditing requirements
	3.2 Review project administration against project plan and <i>measure</i> and report <i>outcomes</i> in accordance with organisational and task requirements

Required Skills and Knowledge

This section describes the essential skills and knowledge and their level, required for this unit.

<p>These skills must be assessed as part of this unit</p>	<ul style="list-style-type: none"> ▪ literacy skills to interpret organisation’s goals for the project; write clear and detailed instructions organised sequentially; and identify administrative activities of project ▪ communication skills to consult with project members; listen and respond constructively; listen to a range of material and process information in a systematic way, including evaluative comments on how these ideas may be applied to a group; and define and monitor objectives of the project group ▪ problem-solving skills to propose solutions from a range of possible solutions ▪ research skills to select categories by which to organise information and assess information for relevance, accuracy and completeness ▪ numeracy skills to forecast and predict timelines; interpret, compare and calculate with money; and use estimation to check calculations and outcomes ▪ ability to relate to people from a range of social, cultural and ethnic backgrounds and physical and mental abilities
<p>This knowledge must be assessed as part of this unit</p>	<ul style="list-style-type: none"> ▪ relevant legislation from all levels of government that may affect aspects of business operations, such as: <ul style="list-style-type: none"> ▪ anti-discrimination legislation ▪ ethical principles ▪ codes of practice ▪ privacy laws ▪ environmental issues ▪ OHS ▪ organisational policies and procedures ▪ organisational structure, and lines of authority and communication within the organisation ▪ planning tools ▪ budgeting strategies for projects ▪ techniques for project planning and setting milestones

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Italicised wording in the Performance Criteria is detailed below.

<p><i>Projects</i> may include:</p>	<ul style="list-style-type: none"> ▪ internal (eg newsletter) ▪ external (eg contracted by external client) ▪ small ▪ large ▪ complex (eg feasibility study)
<p><i>Project activities</i> may include:</p>	<ul style="list-style-type: none"> ▪ coordinating staff ▪ ensuring tasks are carried out ▪ communicating advice/information to team ▪ meetings, including preparation of minutes, papers and reports ▪ preparing project plan ▪ preparing project documentation ▪ monitoring financial arrangements ▪ processing invoices ▪ monitoring timelines ▪ monitoring progress
<p><i>Key administrative milestones</i> may relate to:</p>	<ul style="list-style-type: none"> ▪ contract requirements ▪ developing a work plan ▪ use of project planning software ▪ timelines ▪ progress reports ▪ achievement of key tasks/project phases ▪ measurement/achievement of set outcomes ▪ completion of tasks ▪ completion of contract phases/requirements

Performance Criteria

<p>Requirements of the project brief/contract may include:</p>	<ul style="list-style-type: none"> ▪ project scope ▪ performance standards ▪ agreed timelines ▪ goals and objectives ▪ names of parties bound by contract ▪ payment issues ▪ project description ▪ completion requirements ▪ timelines ▪ staffing ▪ ownership of materials ▪ indemnity and insurance
<p>Monitoring and reporting arrangements may include:</p>	<ul style="list-style-type: none"> ▪ team reports ▪ project control chart ▪ control point chart ▪ milestone chart ▪ budget control chart
<p>Allocating tasks and resources may include:</p>	<ul style="list-style-type: none"> ▪ identifying tasks to be completed in order to achieve project outcomes ▪ prioritising and scheduling tasks ▪ breaking tasks into sub-tasks ▪ arranging tasks into groups ▪ facilitating team involvement in task allocation ▪ assisting to identify team skills and skills gaps ▪ allocating responsibility ▪ assessing workloads ▪ matching skills to tasks ▪ delegating tasks ▪ budget constraints ▪ necessary documents and reference material ▪ identifying resources required
<p>Expenditure may include:</p>	<ul style="list-style-type: none"> ▪ budget considerations ▪ allocated costs ▪ capital expenditure ▪ labour costs ▪ cost of materials and supplies ▪ overhead costs ▪ sub-contractor costs

<p>Monitored timeframes and milestones may include and/or require:</p>	<ul style="list-style-type: none"> ▪ project progress ▪ performance ▪ communication with team members ▪ coordination of team meetings ▪ feedback sessions ▪ solving problems/issues ▪ facilitating change to project plan
<p>Procedures for winding up projects may include:</p>	<ul style="list-style-type: none"> ▪ 'signing off' on project completion/delivery of project outcomes ▪ evaluation and review of actual costs compared to budgeted costs ▪ auditing ▪ formal reporting
<p>Measured outcomes may include:</p>	<ul style="list-style-type: none"> ▪ project objectives ▪ project outcomes ▪ benchmarks ▪ standards ▪ key performance indicators ▪ project monitoring process ▪ achievement of timelines ▪ costs

Evidence Guide

The Evidence Guide provides advice on assessment and must be read in conjunction with the Performance Criteria, Required Skills and Knowledge, the Range Statement and the Assessment Guidelines for this Training Package.

<p>Critical aspects for assessment and evidence required to demonstrate competency</p>	<p>Evidence of the following is essential:</p> <ul style="list-style-type: none"> ▪ integrated demonstration of all elements of competency and their performance criteria ▪ construction of charts; use of project planning tools to assist with project monitoring ▪ monitoring of timelines, milestones and budgets
<p>Context of and specific resources for assessment</p>	<p>Assessment must ensure:</p> <ul style="list-style-type: none"> ▪ workplace project documentation ▪ relevant enterprise policies and procedures
<p>Method of assessment</p>	<p>A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:</p> <ul style="list-style-type: none"> ▪ direct questioning combined with review of portfolios of evidence and third party workplace reports of on-the-job performance by the candidate ▪ observation of presentations ▪ oral or written questioning to assess knowledge ▪ review of project administrative arrangements within project plans ▪ evaluation of project monitoring processes and reports ▪ evaluation of the outcomes of the administrative processes applied within several projects <p>Holistic assessment with other units relevant to the industry sector, workplace and job role is recommended, for example:</p> <ul style="list-style-type: none"> ▪ other general administration units

1.1 Establish your project parameters

Identify and record the purpose, scope and objectives of projects “.”

What you will learn in this section

Before you can commence any project, you must be sure that your project is completely and correctly defined.


In this section you will:

- document exactly what the project is expected to achieve – this is the purpose, scope and objectives of a project
- establish who expects to have an input into the project and exactly what role they will play – these are the key stakeholders
- know what time, budget and quality constraints you have
- know what additional resources or assistance you will need to complete the project – whether you will need external providers or can complete all the tasks internally
- have put into place all the necessary administrative processes to keep track of the project. This includes the initial development of project plans, and the development of timelines and the factors that impact on them

Researching your project

As a project administrator, it is your role to collect and collate all written information about the project. You may have inherited documents that have already scoped the project and you may be required to follow a methodology being used by the project as a whole. You may find that someone else has already written:


- business case documents, project charters or need analyses. These may have presented a case to justify the existence of the project, to define what the project is expected to achieve, and to obtain funding
- business specification documents that define in detail exactly what the project is required to achieve from a business perspective.

	<p>Activity 1: Obtain Existing Documentation</p> <p>Obtain a copy of each existing project document and list here.</p> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/> <hr/>
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Setting up your project documents

Next you need to establish the document in which you will record all the information you gather. Preferably create a word processing file that you can add to and change as you proceed. Alternatively use a loose-leaf folder. Use a new page for each exercise, so that you can move things around and revise pages if necessary.

For the purposes of this course, you will need to create your own document even if you have inherited a suite of documents or are expected to follow an in-house methodology. You may end up duplicating much of the information in those documents, but you will need to create this document so that you have ownership and can develop it according to the instructions in this course. You will be required to submit it for assessment at the end of this course.

	<p>Exercise 1: Create Project Administration document</p> <p>Create your own project administration document, your project plan.</p> <p>You will build the document as you go and it will be used as an assessment tool at the end of the course.</p> <p>What is the name of your document?</p> <hr/>
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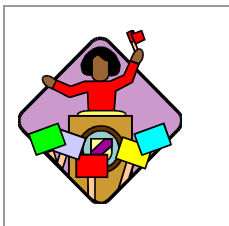
Identify the purpose of your project

What is a project charter or goal?

Definition – Project Charter or Goal

A project charter or goal is the broad definition of what the business wants from the project – the overall goal of the project. It defines, in a very few words, what your project is expected to achieve at the end of the day – that is, the expected outcome.

You start with where you want to be then work backward to establish how to achieve it. Your goal is the driving force behind the project, the touchstone against which everything done on the project is measured.



Activity 2: Identify Project Charter

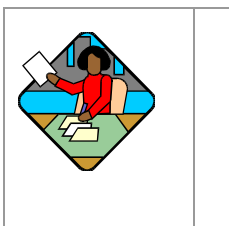
Check to see if a project charter has been written for your project. If one exists, obtain a copy.

Designing a project charter or goal

If you already have a project charter or goal, then check it against the criteria listed in the section below on writing a charter. Is it clearly stated, adequate, and agreed upon by the key players? If not, you may run into trouble later in the project.

If you do not have a project charter or goal already specified, then take the time to create one.

It sounds easy enough but once you start working on defining exactly what you want to achieve, and making sure everyone involved has the same goal in mind, you may be surprised to find how many different goals key players are really aiming for. If you want a project to run smoothly, then everyone involved must have the same key outcome in mind.



Activity 3: Creating a Project Goal

If you have a goal, check to see if any meetings have been called to agree upon the project outcome/charter/goal. Has everyone who should have been consulted been consulted?

If you do not have a goal, who should you involve to create one?

Writing a project charter or goal

Your project charter document or goal statement should be between 25 and 50 words.

It can be written on one side of a 3" x 5" card. It should be a short, sharp statement that can be quoted at the drop of a hat.

A good project goal statement is SMART.

- **Specific** - State exactly what the project is to accomplish, using action words such as "design," "build," "implement," etc. Limit it to essential elements of the project that communicate the purpose of the project and the outcome expected.
- **Measurable** - If you can't measure it, you can't manage it. Watch for words that are difficult to measure such as 'improve', 'increase', 'reduce', 'customer satisfaction' etc.
- **Agreed-upon** – Does the project have the agreement of the key stakeholders, those who will do the project, those who control the resources necessary to get the project done and those who will be affected by the project.
- **Realistic** – Is the project 'do-able', are the skills available, does the project fit with the overall organisational strategy, and can it be done within the deadline?
- **Time-framed** – What is the deadline?

Example

Complete re-landscaping of back garden, as agreed by family, by October 31st 2010, for no more than \$3,000.



Exercise 2: SMART Project Charter or Goal

If you already have a project goal, see if you can improve it. As you can see from the example above, it can be difficult to state each of the SMART criteria.

If you do not have one, write one for your project.

Organise a meeting to ensure each of the key players in your project agrees on the charter. You can either get them to participate in the design or offer them some options to discuss.

Under the heading **Project Charter or Goal**, put the project goal into your document (if you have modified an original, include that as well.)

Identify the scope of your project

Now you have created a precise statement of what you want to achieve, you need to start fleshing out the details.

There are two types of scope you must ensure are clearly defined:

- **product scope**, which details the features and functions that are to be included in the product or service the project is developing

- **project scope**, which details the work that must be done in order to deliver the product with the specified features and functions

You should ensure you have each of these scopes clearly defined in your project administration document.



Activity 4: Find Existing Project Scope

Check to see if either a product scope or a project scope has been written for your project and obtain a copy if they have.

Identify the scope of your product

Definition – Product Scope

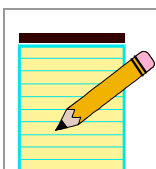
The product scope details the features and functions that are to be included in the product or service the project is developing.

Your product scope will include three aspects:

- your product definition
- the features of your product
- the processes for handling any changes to your scope

Write a product definition

Make sure your product scope includes a definition of your product. You need a statement that defines the product and explains why it is needed. Use the following sentence as a starting point. You may modify the wording if necessary.



Exercise 3: Product Definition

The project is creating _____


to satisfy the (business) need for _____

Under the heading **Product Scope**, subheading **Product Definition**, include your statement in your document.

Write a list of product features

What are the limits to the product, the:

- **must have's** – these define the point at which the project will fail. If it does not have these features it will not achieve its goal
- **should have's** – these are pretty necessary but will not cause the project to fail completely if they are omitted
- **nice to have's** – those little bits that make your product special.

	<p>Exercise 4: Product Features</p> <p>The product must have _____</p> <p>_____</p> <p>_____</p> <p>The product should have _____</p> <p>_____</p> <p>The product could have _____</p> <p>_____</p> <p>Under the heading Product Scope, subheading Product Features, include your statements in your document.</p>
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Write your processes for handling any change to the scope

Despite everyone's best efforts, it is very difficult to scope a project completely accurately and almost invariably the scope will change as the project gets underway.

There is always pressure to add features to the scope. Features that really are necessary are forgotten about and only emerge as the project progresses. In addition, there is a temptation to add 'nice to have's'. This is called 'scope creep'. It can be the downfall of a project if there is no process in place to ensure that anything added really is vital to the original goal.

It may also be necessary to reduce the scope. Things take longer than expected for all sorts of reasons and one way to make up time is to reduce the scope.

1.2 Develop your Project Schedule

*“Develop project plans identifying project activities and **key administrative milestones** and timelines in accordance with the **requirements of the project brief/contract** and in consultation with stakeholders.”*

Now that you have completed all the background research, you can start on the project schedule itself. The terms **project plan** and **project schedule** are often used interchangeably. However, for this course we will be using them more specifically.

Definition – Project Plan

Project plan refers to the **what** and the **how**. It includes all information defined and collected for the project covered in Topic 1, and also includes the project schedule.

Definition – Project Schedule

Project schedule refers to the actual plan for **how** you are going to do it all. You will incorporate this schedule into your plan.

Prepare your project schedule

What is a project schedule?

For all projects, no matter how large or small, you will need a project schedule.

When you develop a project schedule:

- You first identify each task and subtask, how long each task will take, and the development sequence in which they need to be developed.
- You then identify the people, equipment and materials you have available and allocate them to each of the tasks. You will establish how long each resource will take to complete the allocated task and give each task a defined start and end date.

You can then verify the time-line you have and compare it to your overall time-line. You may find you need to make adjustments to get your development completed by your end date. You can also tie costs into this so you can keep a track of how much you are spending compared to your budget.

In Topic 2 we will walk through performing each of these actions.

Project scheduling stages

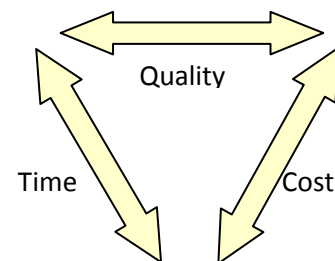
There are three main stages to working with project schedules:

- creating the initial schedule – setting the start and end dates, milestones, budgets and all activities that relate to the entire project
- running the project – where staff are allocated to tasks and progress is mapped
- wrapping up the project – where final data is entered and reports generated.

Juggling the variables

Once your project is commenced you will find yourself juggling three variables. A change in one will impact upon each of the others:

- **Time:** If your end-date changes, your budget will certainly change.
- **Money:** If you increase your manpower to bring the project in on time, or need additional resources or equipment, your budget will change.
- **Quality:** If you change your product definition, your scope or your quality you will have to assess the impact on both time and money.



Identify tasks and task dependencies

Tasks and subtasks

To get started on your schedule, you will need to break down your project into tasks and subtasks.

Definition – Tasks and Subtasks

Tasks and subtasks are smaller, more manageable components of your total project.

Example

If your project is to create a document, your tasks will involve:

- researching the content
- designing the document
- writing
- editing
- proof-reading

These may be further broken into subtasks if required.

Task dependencies

You must then determine whether one task must be completed before another can commence, for example, you cannot expect to proof-read a document before it is written.

Definition – Tasks Dependencies

A task dependency is the relationship between two tasks. For one task to start another task must be either started or finished.

- The task that cannot start until another has started or finished is the successor.
- The task that must be under way or completed is the predecessor.

Showing tasks and task dependencies

What does a schedule look like?

Your project schedule can be as simple as a list of tasks with their start and finish dates written on a notepad, or it can be complex, such as a plan for a project with a multi-million dollar budget generated using a computer package.

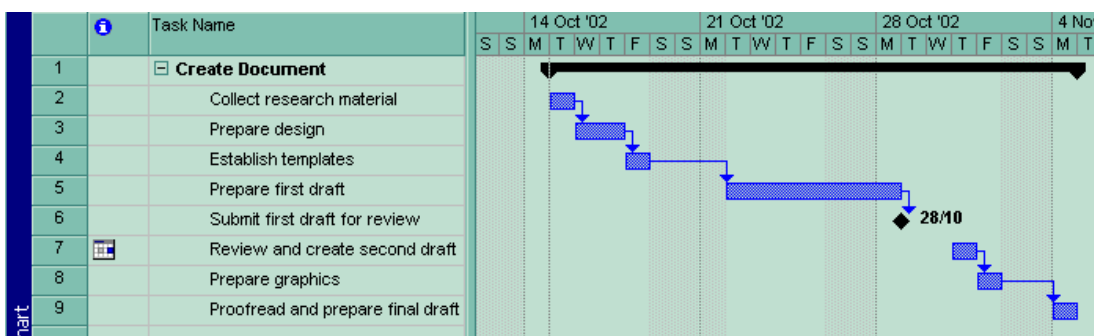
You could show your schedule of tasks and dependencies using table columns.


Below is a very simple task list for one person producing a document over a few weeks. Each task follows on from the previous task and there is a milestone on the date when the document is to be submitted to an external party for review (Item 6). Although this one has been produced using project management software, it could quite easily be shown using tables or a spreadsheet.

The Predecessors column shows that item 2, 'Prepare design' must be completed before Item 3, 'Establish templates' can be commenced. Monday 21st October is a non-work day and so has not been scheduled.

	Task Name	Duration	Start	Finish	Predecessors
1	<input type="checkbox"/> Create Document	14 days	Tue 15/10/02	Mon 4/11/02	
2	Collect research material	1 day	Tue 15/10/02	Tue 15/10/02	
3	Prepare design	2 days	Wed 16/10/02	Thu 17/10/02	2
4	Establish templates	1 day	Fri 18/10/02	Fri 18/10/02	3
5	Prepare first draft	5 days	Tue 22/10/02	Mon 28/10/02	4
6	Submit first draft for review	0 days	Mon 28/10/02	Mon 28/10/02	5
7	Review and create second draft	1 day	Thu 31/10/02	Thu 31/10/02	
8	Prepare graphics	1 day	Fri 1/11/02	Fri 1/11/02	7
9	Proofread and prepare final draft	1 day	Mon 4/11/02	Mon 4/11/02	8

Alternatively this can be shown as a Gantt chart. The chart below contains the same data represented as a Gantt chart, generated using project management software. This chart shows the overall project time-line, the expected duration of each task and the milestones. Once you are underway with your project, and are using some form of software you can display this as a Tracking Gantt – where you display in a different colour what is actually being achieved compared to your baseline.





Exercise 11: Tasks, Dependencies and Durations

List each of your tasks, subtask, dependencies and duration as shown using project management tool, a spreadsheet, table or any other tool you choose.

Include a copy of Exercise 11 into your document under the heading **Project Schedule**. If your project is large and complex, include the smallest view or your data.

We will look at adding resourcing and cost data in Section 2 of this course. For now we need to confirm that this preliminary time-line is realistic and achievable.



Topic 2 Review

Topic summary

In this topic you have identified tasks and task dependencies and made a first pass at creating a simple project schedule.

Document summary

You should have added to your document and have content under the following headings:

- Exercise 11: Tasks, Dependencies and Durations

Personal review / group discussion

Record here any difficulties you experienced completing these tasks, or surprising things you uncovered about the project or yourself.

Consider the following.

- Were you surprised at anything you discovered about your project and how it broke down into tasks?
- Now you have developed your document further, how important do you think it is to maintain all your information in one place?
- Did you experience any difficulties identifying tasks, subtasks or dependencies? Explain.

What you will learn in this section

Once your product has been produced and your project completed, there are a number of wind-up procedures you will need to follow.

These can be summarised under three headings:

- support activities for the product
- administrative wind up
- project evaluation

Some of these activities, particularly the support activities, may well be commenced at some stage during the project.

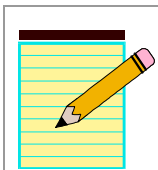
3.1 Administrative Wind-up

*“Identify and complete **procedures for winding up projects** in accordance with statutory, organisational and auditing requirements.”*

There are several aspects to administrative wind-up. The table below summarises these.

Task	Description	Done?
Finalising Personnel Issues	Complete all the administrative functions related to finalising all staff who have been employed on the project: <ul style="list-style-type: none"> ▪ internal staff will be re-deployed within the organisation ▪ contractors will be finalised 	
Disposing of Surplus Equipment	Dispose of all equipment used: <ul style="list-style-type: none"> ▪ return lease equipment and finalise contracts ▪ re-deploy owned materials to other parts of the company 	
Vacating Premises	The premises and desks you have used must be vacated: <ul style="list-style-type: none"> ▪ leases terminated where additional facilities were acquired ▪ space vacated where internal facilities were used This includes all the necessary arrangements with IT departments, telephone connections etc.	

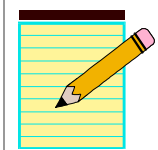
Formal Reporting	<p>When you close out a project, you may want to print:</p> <ul style="list-style-type: none"> ▪ overview reports such as Project Summary, Top-Level Tasks, or Milestones reports ▪ costs reports such as Budget, Over-budget Tasks, Over-budget Resources, or Earned Value reports <p>These may be presented to agreed stakeholders or archived along with other project materials.</p>	
Archiving Project Materials	<p>All important project materials must be archived. The better you have maintained your records throughout the project, the easier you will find this part of the process.</p>	



Exercise 32: Administrative Wind-up

Design your own administrative wind-up checklist.

Include this information in your project plan under the heading **Administrative Wind-up**.



Exercise 33: Wind-up Reports

If you have to generate any wind-up reports, identify those reports and the stakeholders who will receive copies.

Include this information in your project plan under the heading **Administrative Wind-up**, subheading **Wind-up Reports**.

3.2 Project Review & Lessons Learned

*“Review project administration against project plan and **measure** and report **outcomes** in accordance with organisational and task requirements.”*

It is important at the end of a project to review the project against the project plan, and where possible measure and report on outcomes.

- how you as a project team succeeded
- how well you complied to project requirements
- how well you performed against your budget

Perhaps the easiest and best way to review your project's success is by circulating a set of review questions to all the relevant team members – remember that everyone will have a different perspective on how the project went and may need time to think out their responses. This can be followed by a team meeting to discuss responses to the questions and produce a final list of "Lessons Learned."

See Appendix 3 – Project Completion Checklist, page 85, for a sample project checklist.



Exercise 34: Project Completion Checklist

Design your own project completion checklist.

Include this information in your project plan under the heading **Project Completion Checklist**.



Section 3 Review

Section summary

In this section you looked at a range of activities that are often required at the end of a project.

If your project is 'Moving House' then many of these activities will not be required, but you will find that there are other activities that are required.

Exercise summary

You will have made the following additions to your project plan:

Finalise and Review Project Administration

- Exercise 32: Administrative Wind-up
- Exercise 33: Wind-up Reports
- Exercise 34: Project Completion Checklist

Personal review / group discussion

Share anecdotes with the group on the difficulties faced when trying to ensure a clean and tidy project wrap up. Are people really interested? Is there a time or a motivation issue?

Have you seen it done well? Share this experience with the group.

For each anecdote, summarise the learning that comes out of it and record in your Notes section.

BSB BUSINESS SERVICES TRAINING PACKAGE SUPPLEMENT

This learner guide can be used by learners completing a qualification in the BSB Business Services Training Package.

BSBADM407 Administer projects

Application

This unit describes skills and knowledge required to perform the activities associated with the administrative aspects of a project, such as measurement, monitoring, reporting, and winding up the project on completion.

It applies to individuals who work under the supervision of an experienced project manager.

It does not apply to project managers or specialist project managers. For specialist project managers, the units of competency in the Project Management competency field are applicable.

No licensing, legislative or certification requirements apply to this unit at the time of publication.

Unit Sector

Administration – General Administration

Elements and Performance Criteria

This learner guide is structured according to the Performance Criteria for the Unit of Competence. Each major heading represents a performance criterion. All content under that heading relate to that performance criterion.

Element <i>Elements describe the essential outcomes.</i>	Performance criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	How will the evidence be gathered?
1 Plan project administration	1.1 Identify and record the purpose, scope and objectives of project	Activity 1: Obtain Existing Documentation Exercise 1: Create Project Administration document Activity 2: Identify Project Charter Activity 3: Creating a Project Goal Exercise 2: SMART Project Charter or Goal Activity 4: Find Existing Project Scope Exercise 3: Product Definition Exercise 4: Product Features Exercise 5: Scope Change Policy Exercise 6: Project Scope Definition Exercise 7: Project Time Line Exercise 8: Key Stakeholders Exercise 9: Relevant Legislation Activity 5: Indentify Insurance Exercise 10: Insurance Requirements Topic 1 Review
	1.2 Develop project plans identifying project activities and key administrative milestones and timelines in accordance with the requirements of the project brief/contract and in consultation with stakeholders	Exercise 11: Tasks, Dependencies and Durations Topic 2 Review
	1.3 Identify and address factors that affect timeframes in project planning to ensure timeframes are realistic and achievable	Exercise 12: Impacts on Project Calendar Exercise 13: Industrial Agreements Exercise 14: Legislation Exercise 15: Industry Codes of Practice Exercise 16: Quality Standards Exercise 17: Staffing and Resource Requirements Exercise 18: Risks Topic 3 Review
	1.4 Link project budgets to key outcomes within projects and incorporate reporting mechanisms to ensure payments are made/received as outcomes are achieved	Activity 6: Role Clarification Exercise 19: Project Budget Exercise 20: Responsibilities for Monitoring Financial Arrangements Exercise 21: Completion Requirements Topic 4 Review

Element <i>Elements describe the essential outcomes.</i>	Performance criteria <i>Performance criteria describe the performance needed to demonstrate achievement of the element.</i>	How will the evidence be gathered?
	1.5 Identify monitoring and reporting arrangements for project activities and budgets within project plans in accordance with organisational, statutory and auditing requirements	Activity 7: Reporting Responsibilities Exercise 22: Obtaining Information Exercise 23: Sorting and Collating Information Exercise 24: Designing Reports Exercise 25: Distributing Reports Topic 5 Review Skills Assessment 1 – Project Administration Skills
2 Coordinate project administration	2.1 Allocate and monitor tasks and resources in accordance with project requirements	Activity 8: Staff Management Responsibilities Activity 9: Prepare Staff Allocation Skills Assessment 2 – People Skills Exercise 26: Project Baseline Exercise 27: Tracking Gantt Case Study 1 – Identify Solutions Topic 1 Review
	2.2 Detail project expenditure in financial control systems, and monitor against project budgets in accordance with project plan	Exercise 28: Recording Budgeted Expenses Topic 2 Review
	2.3 Monitor project timeframes and milestones and report to designated person/s in accordance with organisational requirements	Activity 11: Document Templates Topic 3 Review
	2.4 Maintain project records in accordance with project and organisational requirements	Exercise 29: Project records Exercise 30: Issues Logs Exercise 31: Scope Changes Logs Topic 4 Review
3 Finalise and review project administration	3.1 Identify and complete procedures for winding up projects in accordance with statutory, organisational and auditing requirements	Exercise 32: Administrative Wind-up Exercise 33: Wind-up Reports
	3.2 Review project administration against project plan, measure outcomes, and report on outcomes in accordance with organisational and task requirements	Exercise 34: Project Completion Checklist Section 3 Review

Foundation Skills

Skill	Performance Criteria	Description	Learner guide page reference
Reading	1.1-1.5, 2.2, 2.3, 3.1, 3.2	<ul style="list-style-type: none"> Identifies and interprets complex and non-complex information from organisational and regulatory documents 	13, 22–23, 31–32, 65
Writing	1.2, 1.4, 2.2, 3.1, 3.2	<ul style="list-style-type: none"> Develops documentation using appropriate structure, accurate spelling, grammar and punctuation 	14–20, 25–29, 38, 43–44
		<ul style="list-style-type: none"> Addresses the context, purpose and audience when generating a range of texts 	14–20, 25–29, 38, 43–44
Oral communication	1.2	<ul style="list-style-type: none"> Engages in discussions using appropriate pitch, volume, intonation and vocabulary appropriate for the audience 	45, 57, 62, 64, 67, 73
		<ul style="list-style-type: none"> Listens closely and asks questions to clarify understanding 	41–42, 49, 51, 53, 72
Numeracy	1.2-1.5, 2.2, 2.3, 3.1, 3.2	<ul style="list-style-type: none"> Extracts, interprets and comprehends mathematical information embedded in documents 	60–62
		<ul style="list-style-type: none"> Performs calculations necessary to estimate timeframes and monitor progress against predetermined budgets 	30, 53–54, 63
Navigate the world of work	1.5, 2.3, 2.4, 3.1, 3.2	<ul style="list-style-type: none"> Recognises and responds to both explicit and implicit organisational procedures and protocols and legislative/regulatory requirements 	22–23, 31–32, 44, 70–71
Interact with others	1.2, 2.1, 2.3	<ul style="list-style-type: none"> Selects the appropriate form, channel and mode of communication for a specific purpose relevant to own role 	42–44, 52–54, 63, 72
		<ul style="list-style-type: none"> Collaborates and cooperates with others to achieve joint outcomes 	42–43, 49–50, 52
Get the work done	1.1-1.5, 2.1, 2.3, 2.4, 3.2	<ul style="list-style-type: none"> Applies formal processes when planning complex tasks, producing plans with logically sequenced steps, reflecting an awareness of time constraints 	Throughout workbook
		<ul style="list-style-type: none"> Monitors progress of plans and makes adjustments, if necessary 	41–44, 53–55, 58–60, 63, 66
		<ul style="list-style-type: none"> Makes a range of decisions in different contexts, taking a range of constraints into account 	11–12, 36–37, 42, 55
		<ul style="list-style-type: none"> Utilises a range of features within digital applications to improve personal productivity, optimising software functions for specific purposes 	11–12, 27–28, 54, 66, 77–79

Assessment Requirements v1.0

Performance evidence

Evidence of the ability to:	Assessment task
<ul style="list-style-type: none"> Prepare a project scope, schedule and budget which includes a clear communication strategy with reference to all legislative and organisational requirements 	Exercise 3: Product Definition Exercise 4: Product Features Exercise 5: Scope Change Policy Exercise 6: Project Scope Definition Exercise 7: Project Time Line Exercise 9: Relevant Legislation Exercise 11: Tasks, Dependencies and Durations Exercise 13: Industrial Agreements Exercise 14: Legislation Exercise 15: Industry Codes of Practice Exercise 16: Quality Standards Exercise 19: Project Budget Exercise 24: Designing Reports Exercise 25: Distributing Reports
<ul style="list-style-type: none"> Coordinate a project according to predetermined timeframes and available resources including the production and maintenance of accurate records 	Exercise 26: Project Baseline Exercise 27: Tracking Gantt Exercise 28: Recording Budgeted Expenses Exercise 29: Project records Exercise 30: Issues Logs Exercise 31: Scope Changes Logs Exercise 32: Administrative Wind-up Exercise 33: Wind-up Reports Exercise 34: Project Completion Checklist
<ul style="list-style-type: none"> Review and measure outcomes for the project on completion. 	Exercise 34: Project Completion Checklist

Knowledge evidence

To complete the unit requirements safely and effectively, the individual must:	Assessment task
<ul style="list-style-type: none"> identify legislation that may affect aspects of project administration 	Exercise 9: Relevant Legislation Exercise 14: Legislation
<ul style="list-style-type: none"> summarise relevant organisational policies and procedures for project administration 	Exercise 5: Scope Change Policy Exercise 20: Responsibilities for Monitoring Financial Arrangements Exercise 22: Obtaining Information
<ul style="list-style-type: none"> outline project planning tools 	Exercise 11: Tasks, Dependencies and Durations Exercise 26: Project Baseline Exercise 27: Tracking Gantt
<ul style="list-style-type: none"> explain budgeting strategies used for projects 	Exercise 19: Project Budget Exercise 28: Recording Budgeted Expenses
<ul style="list-style-type: none"> identify techniques for project planning and setting milestones. 	Exercise 7: Project Time Line Exercise 11: Tasks, Dependencies and Durations Exercise 26: Project Baseline