**Observation Checklist** – **BSBPMG430 - Undertake project work**

**Task 2.3**

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| **Student name:** |  |
| **Student ID:** |  |
| **Date Completed:** |  |
| **Location:** |  |

| **Instructions to student** |
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| Schedule a suitable time with the trainer and assessor to meet with the project team and the project sponsor in week 3 of term to discuss the project plan. The project sponsor is played in the Role-Play by the trainer and assessor in simulated work conditions.  **Before the meeting**:   * Prepare the complete draft of the Project Plan (Task 2.2)   **During the meeting with the project team (meting 1)**:   * Meet with the team and discuss the draft of the project plan * Take into consideration their input into the planning document * Make sure project team members are clear about their responsibilities and project requirements * Note their feedback to apply it to the project plan   Duration: 15minutes  **During the meeting with the project sponsor (meeting 2):**   * Meet with the project sponsor * Present the draft project plan * Gather feedback for and provide information about the plan * Negotiate any proposed adjustment with the project sponsor * Note the changes/adjustments/refinements agreed during the meeting * Obtain approval for the Project Plan   Duration: 5 minutes  If you are absent from class, it is your responsibility to make alternative arrangements with the trainer and assessor to undertake the Role-Play. You may only reschedule once. |

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| **Instructions to assessor** |
| Student is required to role-play the Project Manager in charge of the project and conduct a meeting with the project team and the sponsor to discuss and finalise the project plan.  Observe and evaluate the performance of the student during the Role-Play.   * Print the Observation checklist before the Role-Play. * Make sure to adjust this document to allow enough space for comments and feedback. * Discuss the requirements of the Role-Play with the student to make sure that he/she is clear on what is expected. * Observe and evaluate the performance of the student during the Role-Play using the checklist provided * Ask the student to answer the support questions in this document and provide feedback * Discuss the feedback with the student * All parties to sign and date * The student to submit the observation checklist with his/her assessment   You will be looking for the student's demonstrated ability to facilitate the work of the project team, take ownership of the project plan, collect and use feedback, involve the team members in planning activities and provide guidance and information on individual accountabilities within the project environment. |

# **OBSERVATION**

| Assessor to complete –  Tasks observed and standards expected | Yes /No |
| --- | --- |
| Student performs work in an organised manner:   * The Project Plan draft is prepared * Has prepared to negotiate with the project sponsor, for example identifying objections in advance * Takes notes during the meetings | **Yes  No** |
| Comments: | |
| During the meeting, the student engages with the project team (meeting 1):   * Welcomes the team and thanks the team members for their participation in the planning process * Engages the project team effectively asking questions and listening actively * Listens to objections and suggestions from the project team * Takes notes * Reviews the following in collaboration with the team: * Scope * WBS * Stakeholder register * Project Roles and Responsibilities * Project Governance * Schedule * Budget * Risk Plan * Follows relevant organisational policy and procedures such as meeting procedures * Uses communication skills such as active listening, summarising and questioning to gather and provide information * Evaluates options to make informed decisions about the project plan * Uses this opportunity to make sure project team members are clear about their responsibilities and project requirements * Concludes the meeting on a positive note to facilitate team engagement with the project | **Yes  No** |
| Comments: | |
| During the meeting, the student engages with the project sponsor (meeting 2):   * Professionally welcomes the project sponsor and when interacting with him/her uses appropriate communication protocols * Engages actively in the conversation * Negotiates adjustments and changes * Communicates clearly demonstrating knowledge of the plan * Uses this opportunity to build a working relationship of trust with the project sponsor * Uses communication techniques such as summarising, listening actively and questioning to use the meeting to best effect * Confirms the following: * Scope * WBS * Stakeholder register * Project Roles and Responsibilities * Project Governance * Schedule * Budget * Risk Plan | **Yes  No** |
| Comments: | |
| At the end of the meeting with the project sponsor the student:  Obtains approval for the Project Plan | **Yes  No** |
| If working in a group, the student has actively participated in group work with a substantial contribution that can be assessed individually for all the requirements of this task | **Yes  No** |
| Comments: | |
| Feedback | |
|  | |

| Student to complete -  Questions to support the observation | Answer /Response provided |
| --- | --- |
| How did you prepare for the meeting with the project team?  What information and clarifications did the team require?  What inputs did they provide? |  |
| How did you prepare to respond to objections from the project sponsor and negotiate the project plan's content?  Did you find it challenging to negotiate with the project sponsor? Why?  What have you learned from this experience? |  |
| How did you engage the project sponsor effectively in the meeting and obtain his/her support for the plan? |  |
| Are you confident that the plan will be well executed?? |  |
| What did you do well? What could you improve? |  |
| Assessor's feedback:  The responses provide supporting evidence of knowledge and skills required to facilitate the work of the project team, take ownership of the project plan, collect and use feedback, involve the team members in planning activities and provide guidance and information on individual accountabilities within the project environment: Yes  No | |

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| Task Outcome  Satisfactory  Not Yet Satisfactory |
| Student signature acknowledging the feedback:  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Assessor name………………………………………………………………………………………….  Assessor signature: ……………………………………………… Date: …………………………... |