



BSB50820 Diploma of Project Management

Assessment Guide

Important note: The BSB40920 Certificate IV in Project Management Practice is pre-requisite to this Diploma.
This Assessment Guide should be read together with the Assessment Guide for the Certificate IV.

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BSB50820 Diploma of Project Management

Welcome to the BSB50820 Diploma of Project Management. This course is designed for people who lead project initiation, planning, delivery and close in a variety of organisational and project contexts. Good luck with your study!

Units of study

To successfully graduate, you will need to evidence competence in the following Australian Qualifications Framework (AQF) units:

-  BSBPMG530 Manage project scope
-  BSBPMG531 Manage project time
-  BSBPMG532 Manage project quality
-  BSBPMG533 Manage project costs
-  BSBPMG534 Manage project human resources
-  BSBPMG535 Manage project communications
-  BSBPMG536 Manage project risk
-  BSBPMG537 Manage project procurement
-  BSBPMG538 Manage project stakeholder engagement
-  BSBPMG540 Manage project integration
-  BSBSTR502 Facilitate continuous improvement
-  BSBPEF501 Manage personal and professional development

You can learn more about these units and this qualification here:

-  <https://training.gov.au/Training/Details/BSB50820>

Instead of teaching these units one at a time, our program is structured to align with the project lifecycle. As you will see, studying and applying your knowledge in the order you do things in a real project (as opposed to learning via discrete 'knowledge areas') is a much more practical and enjoyable way to engage with project management.

What this means (from an administrative perspective) is that you will formally commence study in all AQF units of competence at once; and only complete them when you have successfully submitted all of your assessment activities.

This is important to note, as unlike in a traditional study program, should you withdraw from the program at any time (even if you are nearly finished!) we may not be able to assess you as competent in any of the AQF units.

Nevertheless, depending on how far you have progressed at the point of withdrawal, we may be able to assess you as competent in some alternative AQF units – we can have that conversation with you if and when the need arises.

If you would like to see how the AQF units map to our delivery method, we are also more than happy to share our government and industry audited training and assessment model.

We also recognise previous qualifications, knowledge and skills through work, education, training and life experiences. Your mentor will discuss this with you and apply credit transfer or RPL to those units that may be relevant.

More about our student policies, including your rights and obligations, can be found here:

-  <https://institute.pm/student-handbook/>

Assessment

In order to successfully demonstrate competence to the requisite standard, students must identify a complex public or private project that has recently completed and, *as a project*, conduct a comprehensive review of its performance.

To meet the minimum threshold of complexity, the project you review must involve:

- ☰ a delivery team of three (3) or more people (including the project manager)
- ☰ detailed project documentation at all stages
- ☰ formal governance structure (for example, a sponsor and/or steering committee), and
- ☰ multiple, complex and dynamic stakeholder relationships.

The final output will take the form of a hypothetical consultant's report commissioned by the Board of Directors of the performing organisation. The report will be aimed at recommending improvements for the firm's performance of future projects. It is **not** a (product) review of the deliverable created by the project.

In addition to common requirements for business writing, the Review should address the following:

- ☰ project assets, including (but not limited to):
 - project initiation documentation (for example: a project stakeholder register, communications plan, business case and charter); and
 - project planning documentation (for example: a project work breakdown structure, schedule, budget; procurement assets and risk register); and
 - project delivery documentation (for example: project status reports, change requests, issues register, lessons log, contracts and collateral); and
 - project close documentation (for example: project handover checklists, acquittals, closure reports and evaluations); and
- ☰ project performance, including (but not limited to):
 - planned versus actual performance to scope, schedule and budget; and
 - stakeholder identification and engagement; and
 - business case development; and
 - scope definition and management; and
 - schedule development and control; and
 - cost estimating and control; and
 - procurement and contract management; and
 - risk identification, prioritisation and treatment; and
 - project team management and performance; and
 - project governance and change control; and
 - project delivery and handover; and
 - other lessons learned.

At a minimum, you would be expected to conduct one-on-one interviews with the project manager, project sponsor and a client representative. Other project stakeholders should also be consulted. This can be done using a variety of methods, including interviews, workshops and surveys.

For assessment purposes, the Review is to be at least **4,000 words** in length. The word count does not include the executive summary, headings and titles, guidance text, footnotes, references and/or appendices. The executive summary must not be more than 10% of the overall word count.

A template to support this review can be found at: <https://open.institute.pm/free-project-management-resources/> or you can use your own workplace assets

You are also required to participate in assessment interviews at each stage of the review project, including an oral defence of your review findings. These assessments are typically conducted via Zoom or another video-conferencing platform.

Study plan

To properly plan your progress, we recommend adopting the following study plan. There is no penalty for completing tasks ahead of schedule – if you have the available time, this is something you may wish to discuss with your mentor. Your mentor can also assist you in keeping to this plan and maintaining momentum throughout the course.

Weeks 1-4	Identify a project	Assessment interview – terms of reference / plan
Weeks 5-8	Audit project documents	Assessment interview – status report
Weeks 9-12	Interview stakeholders	Assessment interview – status report
Weeks 13-18	Analyse and report	Final report
Weeks 19-20	Oral defence	Assessment interview – defence

All assessment interviews will be conducted via videoconference and recorded so as to provide evidence of your competence. You may refer to notes; however, you cannot read from a script. We retain the recording of this assessment as per our regulatory obligations and privacy policy.

Graduate outcomes

Upon completion of our Certificate IV in Project Management Practice, you will be able to:

-  Apply advanced project management concepts, methods and theories
-  Demonstrate the technical skills of project management
-  Leverage the interpersonal aspects of project management
-  **Lead the initiation, planning, delivery and close of complex projects**
-  Evaluate and respond to project challenges in all environments
-  Professionally engage with diverse project stakeholders
-  Critically reflect on own performance and the performance of others

You will also be directly admitted to the Institute of Project Management as a **Certified Project Officer** (or Certified Project Professional / Master if you can evidence the requisite project experience).

Project Review

Kick-off meeting

Your BSB50820 Diploma of Project Management is a project!

In your initial meeting with your mentor, you will:

- 🌀 Define the outcomes you want from this course (*why* you are studying)
- 🌀 Relate those outcomes to the objectives of the individual and/or organisational stakeholders paying for it
- 🌀 Plan the course scope, time and resource requirements
- 🌀 Consider any risks to course completion and how they might be managed, and
- 🌀 Agree information and communication requirements.

Following this meeting, you, your mentor and (if sponsoring) your employer will sign off and commit to your training plan.

At regular intervals throughout the course, you will give updates on the status of your study project to your mentor and negotiate changes to your study plan.

This planning process, status updates that follow and your end of course reflection form part of the assessment for your BSB50820 Diploma of Project Management.

Stage 1 – Identify a project

One commonly expressed concern is that people do not have access to a sufficiently complex project for review, or a project that they are a 'stranger' to. In this instance, we recommend a number of alternatives:

- 🌀 Talk to your employer – there may be a number of projects suitable for review outside your immediate department. You might also be able to 'swap' a project with a fellow candidate.
- 🌀 Contact the local chapter of your relevant industry association – for example, if you are a software engineer, you could connect with other software engineers and have them suggest suitable projects for review.
- 🌀 Consider your social networks – are you a member of a sporting organisation or other community group? Do they have any recently completed projects? They may value your new-found expertise!
- 🌀 Ask a family member or friend – do they have access to suitable projects within their employer, industry or social networks?
- 🌀 Chase your dream – is there a public festival or event you've always wanted to be involved in? Is there a new career you'd like to pursue? Use your review as the opportunity to make new contacts and create new networks that might literally be life-changing!

We have found that a surprising number of people out there are receptive to the idea of having their projects externally reviewed for both certification and practical purposes. It is nonetheless important that you present yourself professionally, are fully prepared, and ready to answer any questions they might have about the process.

Therefore, when making your introduction, either in person or via a letter, you should be able to fully explain:

- Who you are
- What you are doing
- Why you are doing it
- The benefit to them (both as an individual and an organisation)
- How the review process will work
- What you need from them
- When you need it
- How much it will cost
- How long it will take
- What they can expect at the end of the process

You should also be willing to sign a **non-disclosure agreement (NDA)** to protect any information learned in the course of your review that might be commercially sensitive. As part of your terms and conditions of enrolment, IPM enters into a binding NDA with you (the candidate), however some review sponsors may ask you to sign one directly with them.

As always, please ensure you fully read and understand what you are agreeing to in the NDA. Also ensure that the participating organisation fully understands that your final report will be shared with IPM for assessment purposes only, and that we will treat the data and findings you share with us in the strictest confidence (as per our NDA with you, which is included in the terms and conditions of your enrolment). As a rule, we do not directly enter into NDAs with your review partners.

Finally, you should always try and review a **successful** (as opposed to a failed) project. The lessons learned may be just as strong and you are far more likely to get stakeholder buy-in and participation if they expect to be praised instead of damned!

Assessment task

Once you have identified a project, you should schedule a **45-60 minute interview** with your mentor to confirm your progress.

In this meeting, you will confirm and chosen project is appropriate and agree the **terms of reference** for the review (what is in and out of scope).

You should also be prepared to:

- List the project documents and assets you will need to complete the review
- Identify the key stakeholders and your engagement strategy
- Prepare a baseline review WBS and schedule – is a budget required?
- Consider how you will manage any risks (for example, what if certain documents / stakeholders are unavailable)

Stage 2 – Audit project documents

There are two (2) stages to data collection; however, they are not necessarily consecutive. The first stage involves gathering and reviewing all the relevant project planning documentation, including (but not necessarily limited to) the baseline and subsequent versions of the project:

- 📌 Concept brief
- 📌 Business case
- 📌 Project charter
- 📌 Scope (WBS)
- 📌 Schedule
- 📌 Budget
- 📌 Risk register
- 📌 Stakeholder register
- 📌 Communications plan
- 📌 Procurement plan
- 📌 Quality plan
- 📌 Human resource plan
- 📌 Position descriptions
- 📌 Finance plan

You should also review any and all project:

- 📌 Status reports
- 📌 Meeting agendas & meetings
- 📌 Change requests
- 📌 Issues logs
- 📌 Change logs
- 📌 General correspondence

From this data, you will begin to get a sense of what the project did well, and where you may have opportunities to improve the future delivery of like projects. You might also draw important conclusions from the poor recordkeeping within (or even absence of) any or all of these documents.

Assessment task

Upon completing your audit of the project documents, you should schedule a **45-60 minute interview** with your mentor to discuss your preliminary findings. These first impressions will inform and guide the stakeholder interviews you conduct in the next stage.

You will also be asked to confirm your progress against the previously agreed study training plan.

In following the standard status report format, you will be asked about your project's:

- 📌 Overall status, as well schedule, budget and scope status
- 📌 Work completed since the last report
- 📌 Work to be completed by the next report
- 📌 Exceptions, including:
 - Any issues or risks and their priority
 - Their impact on schedule, budget, scope, outcomes and any other factors
 - Actions required and/or currently in place

If necessary, changes to the training plan should be negotiated and agreed upon by stakeholders.

Stage 3 – Interview stakeholders

At a minimum, you would be expected to conduct one-on-one interviews with the project manager, project sponsor and a client representative. Other project stakeholders should also be consulted. This can be done using a variety of methods, including interviews, workshops and surveys.

Engaging stakeholders in this way can give you new perspectives and insight into how the project performed and opportunities for improvement.

As you are also likely to discover more relevant documents as part of this process, you should continually update your secondary (document) sources and the relationships that exist therein.

Assessment task

At the end of each of the stakeholder interview process, you should schedule a **45-60 minute interview** with your mentor to discuss your now more detailed findings.

At this point, your mentor is an excellent resource to bounce ideas off and begin to challenge some of your formative analysis. Although your mentor will not directly review any of the data you gather; they can support, encourage and guide you as you commence your analysis.

You will also be asked to confirm your progress against the previously agreed study training plan.

In following the standard status report format, you will be asked about your project's:

- 🌀 Overall status, as well schedule, budget and scope status
- 🌀 Work completed since the last report
- 🌀 Work to be completed by the next report
- 🌀 Exceptions, including:
 - Any issues or risks and their priority
 - Their impact on schedule, budget, scope, outcomes and any other factors
 - Actions required and/or currently in place

If necessary, changes to the training plan should be negotiated and agreed upon by stakeholders.

Stage 4 – Analyse and report

Data analysis is the process of converting all the fragments of *information* you have collected into reliable, actionable *intelligence*.

Unfortunately, the amount of data you have likely generated could answer an incredible number of questions – you could spend the rest of your life trying to analyse all of that information! That is why it is important to go back to the original questions that you are trying to answer.

At the highest level, these questions can be found in your Review terms of reference; drilling down they may be included in your pre-defined report template. Beyond that, look at other ideas and themes that have emerged from your data (surprises), and consider them in terms of how they relate to your questions and their potential implications for the performing organisation.

You should always be looking for multiple points of evidence for each of your conclusions, all of which will lead to actionable recommendations – the entire purpose of your Review.

Although you may use any report format, a Project Review template appropriate to this assessment task can be downloaded from <https://open.institute.pm/free-project-management-resources/>. Ensure the blue guidance text is deleted – it cannot be included in your word count!

Minimum word counts for each section are suggested below; however, they are presented as a **rough guide**, and not intended to be prescriptive. For example, not all the items in *Section 5 – Lessons Learned* may actually reveal lessons to learn! You are encouraged here to use your expert judgment in selecting how much detail to respond with at each criterion.

1 PROJECT OVERVIEW

- 1.1 Project description 100 words
- 1.2 Intended outcomes 100 words
- 1.3 Strategic objectives 100 words

2 REVIEW METHODOLOGY

- 2.1 Terms of reference 100 words
- 2.2 Documents reviewed 100 words
- 2.3 Stakeholders consulted 100 words
- 2.4 Assumptions and constraints 50 words

3 PROJECT PERFORMANCE

- 3.1 Performance against baseline plans
 - 3.1.1 Performance against baseline scope 50 words
 - 3.1.2 Performance against baseline schedule 50 words
 - 3.1.3 Performance against baseline budget 50 words
- 3.2 Benefits delivered 100 words
- 3.3 Benefits yet to be realised 100 words
- 3.4 Unplanned outcomes 50 words
- 3.5 Changes 150 words

4 OPEN ACTIONS

- 4.1 Open project issues 50 words
- 4.2 Residual risks 50 words
- 4.3 Handover/training needs 50 words
- 4.4 Other required activities 50 words

5	LESSONS LEARNED	1500 words
5.1	Stakeholder identification and engagement	
5.2	Business case development	
5.3	Scope definition and management	
5.4	Schedule development and control	
5.5	Cost estimating and control	
5.6	Procurement / contract management	
5.7	Risk identification, prioritisation and treatment	
5.8	Project team management and performance	
5.9	Project governance and change control	
5.10	Project delivery and handover	
5.11	Other lessons learned	
6	PROJECT MANAGEMENT TEMPLATES, TOOLS AND ASSETS	250 words
7	CONCLUSION	100 words
8	RECOMMENDATIONS	750 words

Total words: 4,000

9	APPENDICES	<i>Not included in word count</i>
9.1	Business case and/or project charter	
9.2	WBS, schedule and budget	
9.3	Risk and stakeholder registers	
9.4	Position descriptions	
9.5	Status reports / change requests	

Mentor support

You should look to engage your mentor at least twice during the analysis and reporting stage, prior to submitting your final report.

In the first instance, you should provide a 'dot-point draft' to your mentor. This involves noting your thoughts for each sub-section of the report, without going into any real detail. The process allows you to organise your thinking into a coherent structure for high-level discussion and feedback. Note that if you write too much at this stage – and subsequently discover you are not on the right track – you may waste significant effort in re-work.

Your second draft should incorporate the feedback provided and begin to flesh out the ideas into a more complete, evidenced analysis. As a guide, the draft you provide to your mentor here should be around 75% complete.

This section is all about critical analysis. For some topics, you might simply acknowledge that there were no major issues or lessons to be learned – for others, you may present several hundred words of analysis. Where you place your emphasis depends on the specific contingencies of the project you are reviewing.

Following this, you should be ready to finalise your report, applying appropriate formatting and style so that it presents as well as it reads.

Although these stages are proposed here as the ideal points of collaboration, in practice you may choose as few or as many interactions as you like as part of the unlimited, on-demand nature of the mentoring program.

Stage 5 – Oral defence

Upon accepting your completed report, your mentor will schedule a **45-60-minute interview** with you.

This Oral Defence simulates a Board level interrogation of your Review conclusions and its recommendations – it is not an oral presentation of your findings (eg PowerPoint). You need to be familiar with larger issues, such as the project management frameworks, theories and best practice; more importantly, you need to have a deep understanding of the project you have reviewed and the major issues encountered.

As most defences are conducted via Zoom, you should have with you important materials for easy reference in the course of your defence; these may include key project documents, stakeholder interview notes, and the like. Note that we retain the audio records of these assessments as per our regulatory obligations and privacy policy.

As you will see from the assessment criteria (below), your defence is evaluated in terms of content and clarity, as well as style. Don't speak too fast and don't read from notes. Be prepared to clarify or elaborate on your assumptions, theoretical positions, methods, and conclusions. Often an examiner plays the devil's advocate to see how well you can think on your feet and defend yourself.

Don't rush your answers. It is perfectly acceptable to think for a couple of seconds or ask if you are on the right track. If you are not clear about the question you are entitled to ask for clarification.

Try to be concise and to the point, but at the same time demonstrate that you have a good grasp of the complex issues involved. In other words, do not give superficial answers, but at the same time, do not try and present an entire PhD-level theory of project management in each response.

Importantly, you should put up a good defence without being defensive. A good defence means that you can provide strong logical arguments and empirically support or defend your position or recommendations. However, don't become hostile if the examiner is critical of your work.

If they are able to point out some real flaws or weaknesses in your review, accept their criticisms with humility, and indicate how you might learn from this for the future.

Note that this is an essential real-world skill and may be directly assessed!

In addition to the oral defence, you will spend additional time reflecting on your own project performance. This is your final opportunity to demonstrate competence to the Diploma standard and will close any gaps in our assessment criteria.

Mentor support

Candidates who have actively engaged their mentor throughout the report writing process should feel confident that they are adequately prepared for the oral defence. Mentor supported candidates may also attempt the oral defence an unlimited number of times.

Assessment integrity

Academic misconduct includes cheating, plagiarism, allowing another candidate to copy work for an assignment or an examination, and any other conduct by which a candidate:

- 🌀 seeks to gain, for themselves or for any other person, any academic advantage or advancement to which they or that other person is not entitled, or
- 🌀 improperly disadvantages any other candidate.

Plagiarism is a form of cheating. It is taking and using someone else's thoughts, writings or inventions and representing them as your own, for example:

- 🌀 using another author's words without attribution
- 🌀 submitting for original assessment a project document that was prepared by someone else in your organisation, or
- 🌀 copying another candidate's work.

It is **not** plagiarism when you:

- 🌀 use another author's words, putting them in quotation marks and acknowledging the source; *for example*, quoting the project's objectives from the project charter in your reflection, or
- 🌀 collaborating with or seeking feedback from others on assessment tasks, as long as you remain the principal author and document owner.

All your assessable works may be submitted to the plagiarism checking service *TurnItIn* to obtain a report on possible instances of plagiarism. Assessable works may also be included in a reference database. Candidates engaging in any form of academic misconduct may be subject to the imposition of penalties that range from a deduction or cancellation of marks to exclusion from the course.

Confidentiality

Although all the information you share with us is managed in accordance with our [Privacy Policy](#), when completing assessment tasks, please take every care to de-identify or redact confidential stakeholder or organisational information.

If you have concerns about the impact this may have on your ability to demonstrate your competence and complete this course, please raise this with your mentor at the earliest opportunity.

Recognition of prior learning (RPL)

The Institute of Project Management accepts that learning takes place through formal study, informal learning in the workplace and from life experience. Our [Recognition of Prior Learning Policy](#) outlines how you may apply to have your prior learning recognised by the Institute and what procedures the Institute has in place to assess your learning and work/life experience.

Because of the [unique structure](#) of this program, students are typically awarded RPL for previously prepared project reviews or close-out reports that meet the standards stipulated in this guide.

Please consult directly with your mentor if you are seeking RPL for any part or all of your BSB50820 Diploma of Project Management. More about our student policies, including your rights and obligations, can be found here: <https://institute.pm/student-handbook/>