

Learning Assessment Guide

Unit Standard 7454 – Version 2

Plan, manage, and view projects

Level 5 – 7 Credits

Assessment Summary			
Learner to complete			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
Assessor to complete			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

This Learning Assessment Guide is made up of:

1. instructions for preparing for assessment
2. description of the assessment task;
3. checklist for each project;
4. verification form for each project;
5. Assessment Guide.

Assessment Task One – Elements 1, 2 and 3

Task one instructions

- Identify two projects that you have planned, managed and reviewed and consider whether these two projects are each complex enough to meet all the points in the checklist.
- Consider whether you personally have been the planner, manager and reviewer of each project.
- Contact your assessor to discuss the suitability of each project for assessment.
- Produce a report for each project that explains how you met all of the performance criteria (or points listed in the checklist). Existing documentation from each project may form all or part of your report.
- Remember that the reports **are** the assessment task and that it is your responsibility to provide the assessor with the evidence that you have met all the requirements of this unit standard.
- For each project ask a relevant verifier (probably your manager) to attest to your level of involvement in that project and your authorship of that report.
- Submit your reports and the verification forms to your assessor (by post or by email.)
- Be prepared to answer questions that the assessor may ask to gain further information and clarification.

The remaining pages are copies of the material that will be used by the assessor to evaluate your project reports.

Assessment Task One – Elements 1, 2 and 3

Prior to completing the assessment task/s the learner is required to plan, manage and review two projects each of which is sufficiently complex to meet all the performance criteria of this unit standard.

The assessment task requires the learner to produce **two reports** (each for a different project). Both reports must show that the learner has met all the performance criteria of this unit standard.

The projects should have taken place in the past two years.

Further evidence of the learner's responsibilities for each project must be provided by the verifier (e.g. manager, client).

In addition, the assessor may ask the learner a range of questions to add to and/or clarify information provided in the reports.

To complete this task satisfactorily the learner will need to:

- Produce two reports that result in all checkboxes of the Assessor Checklist being ticked for each of the two reports.
- Arrange completion of the verification form by the learner's verifier showing that the learner planned managed and reviewed the projects and wrote the reports.
- Answer any questions posed by the assessor

Assessor Checklist – Project One

Project name: _____

Report meets the following requirements (tick ✓ or x):

Element 1: Plan Projects

The report includes a complete project plan which:

- € Includes outcomes (vision, purpose, objectives)
- € Is in accordance with all organisational policies, procedures, legal requirements and standards
- € Is achievable in a given time frame
- € Provides for contingencies
- € Is approved by sponsor
- € Has project team members with the skills necessary to satisfactorily complete the project.

Has dates given for:

- € Approval
- € Start
- € Completion
- € Activities
- € Milestones

Has individuals:

- € Identified
- € Consulted
- € With the responsibilities of each determined
- € With the responsibilities of each agreed
- € With the responsibilities of each recorded

Has resources:

- € Identified
- € Available
- € With control processes (audits, reviews checks) identified

Element 2: Manage Project Implementation

Report describes the way in which the project was completed:

- € On time
- € Within budget
- € Within resource allocation
- € To the required quality

- € To stakeholders' (customers and organisation) satisfaction
- € With reviews completed at planned intervals
- € With contingency actions taken to keep plan on track as necessary
- € With stakeholders being kept informed at appropriate intervals
- € With team members authorised to complete project
- € With team members adequately resourced to complete project

Project documentation is:

- € Complete
- € Concise
- € In the required format
- € Filed according to organisation's procedures and is accessible to all who need it

Element 3; review project effectiveness

Project outcomes are evaluated.

- € Outcomes are reviewed for achievement
- € Outcomes are compared against objectives
- € Outcomes are compared against resources

Variances against plan:

- € Are noted
- € Reasons are given

- € Strengths of the project/project plan are noted
- € Weaknesses of the project/project plan are noted
- € Suggestions for improvement are noted
- € Suggestions for improvement disseminated to appropriate individuals

Project review records are:

- € Complete
- € Concise
- € In the required format
- € Filed according to organisation's procedures and is accessible to all who need them

Name of assessor: _____

Signature: _____

Date assessed: _____

Verification form – Project One

Project name: _____

_____ (name of learner) is currently
being assessed in Unit Standard 7454 Plan, manage and review projects.

I verify that this learner was:

- € the manager of the project
- € writer of this report.

I confirm that:

- € approval was given to the project
- € relevant individuals were consulted in the planning phase
- € the report is a true record of the project's plan, implementation, and review.
- € the project was completed in the last two years

- € I am willing to be contacted by the assessor if s/he has any questions about the learner's management of the project.

Name of verifier: _____

Position of verifier: _____

Contact phone number/s: _____

Email address: _____

or fax number: _____

Date verified: _____

Thank you for your assistance.

Assessor Checklist – Project Two

Project name: _____

Report meets the following requirements (tick ✓ or x):

Element 1: Plan Projects

The report includes a complete project plan which:

- € Includes outcomes (vision, purpose, objectives)
- € Is in accordance with all organisational policies, procedures, legal requirements and standards
- € Is achievable in a given time frame
- € Provides for contingencies
- € Is approved by sponsor
- € Has project team members with the skills necessary to satisfactorily complete the project.

Has dates given for:

- € Approval
- € Start
- € Completion
- € Activities
- € Milestones

Has individuals:

- € Identified
- € Consulted
- € With the responsibilities of each determined
- € With the responsibilities of each agreed
- € With the responsibilities of each recorded

Has resources:

- € Identified
- € Available
- € With control processes (audits, reviews checks) identified

Element 2: Manage Project Implementation

Report describes the way in which the project was completed:

- € On time
- € Within budget
- € Within resource allocation
- € To the required quality

- € To stakeholders' (customers and organisation) satisfaction
- € With reviews completed at planned intervals
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- € With stakeholders being kept informed at appropriate intervals
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- € Complete
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- € Reasons are given

- € Strengths of the project/project plan are noted
- € Weaknesses of the project/project plan are noted
- € Suggestions for improvement are noted
- € Suggestions for improvement disseminated to appropriate individuals

Project review records are:

- € Complete
- € Concise
- € In the required format
- € Filed according to organisation's procedures and is accessible to all who need them

Name of assessor: _____

Signature: _____

Date assessed: _____

Verification form – Project Two

Project name: _____

_____ (name of learner) is currently being assessed in Unit Standard 7454 Plan, manage and review projects.

I verify that this learner was:

- € the manager of the project
- € writer of this report.

I confirm that:

- € approval was given to the project
- € relevant individuals were consulted in the planning phase
- € the report is a true record of the project's plan, implementation, and review.
- € the project was completed in the last two years

- € I am willing to be contacted by the assessor if s/he has any questions about the learner's management of the project.

Name of verifier: _____

Position of verifier: _____

Contact phone number/s: _____

Email address: _____

or fax number: _____

Date verified: _____

Thank you for your assistance.

Assessment Guide

Use the following guide to assess the learner's competence with unit standard 7454 version 2: Plan, manage and review projects.

Task / Assessment	Evidence Required	Judgement	
<p>Task 1 / Elements 1, 2 and 3</p> <p>This task involves the learner managing two projects and providing the assessor with two written reports (one for each project).</p>	<p>Each project must be sufficiently complex that all the performance criteria are met.</p>	Completed project one.	Yes / No
		Completed project two.	Yes / No
	<p>Each report must include a project plan, a description of the project's implementation, and a review of the project's effectiveness.</p>	The assessor's checklist shows that the first project has met all of the performance criteria.	Yes / No
	<p>Attestation must be provided that the project has been managed by the learner and that the report has been written by the learner.</p>	The assessor's checklist shows that the second report has met all of the performance criteria	Yes / No
	<p>The learner may be required to answer questions to provide further information and to clarify material submitted.</p>	Projects occurred within the past two years	Yes / No
	<p>Questions and answers should be documented by the assessor.</p>		