

Cambridge **TECHNICALS LEVEL 3**

BUSINESS

Cambridge
TECHNICALS
2016

Unit 16

Principles of project management

M/507/8163

Guided learning hours: 60

Version 3 Assessment guidance and Opportunities for
applying learning across units updated - August 2016

LEVEL 3

UNIT 16: Principles of project management

M/507/8163

Guided learning hours: 60

Essential resources required for this unit: None

This unit is internally assessed and externally moderated by OCR.

UNIT AIM

Businesses undertake projects of all kinds that vary in terms of purpose and scope. Some examples of business projects are running an event, launching a marketing campaign, carrying out market research and setting up bookkeeping for local clubs or charities. A project comprises a set of tasks and activities to be carried out in order to reach an intended purpose. Being able to prepare and manage a project is an important skill needed by many different people working in business.

In this unit you will learn about the stages of project management, and the type of skills a project manager should have. You will also learn why you need to monitor the progress of projects as it is vital to their successful completion and implementation.

You will plan a project, and prepare a project plan. You will learn about the different planning tools available for project planning. Whilst preparing the project plan, you need to be aware of internal and external factors which might have an impact on the planning process, as well as the successful completion and implementation of a project.

This unit will help you to develop the skills required to plan projects and be aware of possible obstacles that can impact on the outcome of a project.

TEACHING CONTENT

The teaching content in every unit states what has to be taught to ensure that learners are able to access the highest grades.

Anything which follows an i.e. details what must be taught as part of that area of content. Anything which follows an e.g. is illustrative. It should be noted that where e.g. is used, learners must know and be able to apply relevant examples in their work, although these do not need to be the same ones specified in the unit content.

For internally-assessed units you need to ensure that any assignments you create, or any modifications you make to an assignment, do not expect the learner to do more than they have been taught, but must enable them to access the full range of grades as described in the grading criteria.

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
<p>1. Understand the stages of project management</p>	<p>(When introducing this learning outcome, tutors should cover the meaning of key terms such as:</p> <ul style="list-style-type: none"> • project, i.e. <ul style="list-style-type: none"> ○ definite beginning, end and outcome of project ○ types of business project (e.g. management, manufacturing, construction, research, IT) • project management • project manager • project stakeholders (e.g. client, customers/users, project manager, project team members, suppliers, consultants/contractors) <p>1.1. The stages of project management, i.e.</p> <ul style="list-style-type: none"> • project initiation, i.e. <ul style="list-style-type: none"> ○ define aims and objectives (SMART), purpose, scope, deliverables, establishing key targets and deadlines ○ feasibility study ○ project proposal ○ business case ○ define project controls (e.g. time, cost, quality strategies) ○ define communication strategy • project planning, i.e. to produce a: <ul style="list-style-type: none"> ○ project plan ○ resource plan (e.g. what is needed – human resource requirements, tools and equipment – and when) ○ financial plan (e.g. sources of finance – corporate budget, external funding – timescales for release of finances) ○ quality plan (e.g. to set quality targets and quality control methods) ○ risk plan (e.g. identification of risks, severity of risk, risk owner, contingencies, documentation of risks and actions)

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<ul style="list-style-type: none"> • project direction (executing and implementing), i.e. <ul style="list-style-type: none"> ○ manage project controls (e.g. time, cost, quality, risk) ○ report project status ○ manage risk ○ manage communications • project closure and post implementation review, i.e. <ul style="list-style-type: none"> ○ review of project (e.g. extent to which aims and objectives have been met, business benefits delivered, customer requirements met, whether remained within time and budget) ○ identify lessons learnt (e.g. strengths, weaknesses, areas for improvement)
<p>2. Understand the skills project managers need to have</p>	<p>2.1 The skills project managers need, i.e.</p> <ul style="list-style-type: none"> • communication (e.g. awareness of communication channels and ability to use appropriate forms of communication for the audience , listening and responding (e.g. to stakeholders)) • team building (e.g. listening and responding to team member issues, building team rapport, motivating project team members) • planning (e.g. scheduling, planning what work needs to be done, when and who is going to do it, dealing with changes to projects as and when necessary, making sure projects deliver the expected outcomes and benefits) • conflict management (e.g. managing competing priorities for resources, managing tension between project team members and/or stakeholders) • time management (e.g. duration of tasks, what is feasible and realistic in the timescales, measuring progress) • negotiation • problem-solving (e.g. defining the problem, evaluating options, choosing an option, implementation and evaluation) • influencing • leadership • critical thinking (e.g. weigh up advantages and disadvantages to make good decisions, structure arguments logically) • business case writing (e.g. project conception and initiation) • risk management (e.g. knowing when to escalate risks and problems, contingency planning) • cost control (e.g. making sure the project is running to budget)

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
<p>3. Understand how and why projects are monitored and factors that influence a project</p>	<p>3.1 How and why projects are monitored, i.e.</p> <ul style="list-style-type: none"> • use methods of monitoring a project (e.g. budget variance analysis, quality management, risks and decisions logs, regular reporting, comparison of actual versus planned progress) • reasons for monitoring (e.g. reporting progress against the plan, to ensure the project remains viable, to identify potential slippage, identify issues and problems, identify possible solutions, escalate/delegate to managers and colleagues) <p>3.2 Factors that influence a project and which need monitoring, i.e.</p> <ul style="list-style-type: none"> • internal, i.e. <ul style="list-style-type: none"> ○ organisation's aims/objectives (e.g. how aligned is the project? how clear are the objectives?) ○ resource (e.g. constraints on budget, human resources) ○ procedures and policies (e.g. corporate social responsibility) • external, i.e. <ul style="list-style-type: none"> ○ suppliers/contractors (e.g. availability, specialisms) ○ finance (e.g. sources of funding, inflation, exchange rates) ○ laws and regulations (e.g. planning permission, employment law, Health and Safety at Work Act) • other factors that present a risk to the success of the project, i.e. <ul style="list-style-type: none"> ○ poor leadership (e.g. failing to communicate, overlooking stakeholders who should be involved) ○ poor planning (e.g. not updating schedules regularly, lack of coordination of activities, no contingencies) ○ failing to manage change (e.g. changes occurring within the project and/or as a result of the project which are not controlled) ○ objective(s) of project not clearly defined ○ lack of resources (e.g. resources not ordered in time, resources not available) ○ poor project reporting
<p>4. Be able to prepare project plans</p>	<p>4.1 the components of a project plan, i.e.</p> <ul style="list-style-type: none"> • project vision, i.e. <ul style="list-style-type: none"> ○ description of project (e.g. key outcomes, deliverables, priorities) ○ target audience (e.g. project stakeholders and their needs) ○ setting aims and SMART objectives • resource requirements, i.e. <ul style="list-style-type: none"> ○ physical resources (e.g. materials, equipment, machinery, tools, software) ○ human resources (e.g. project management team, support staff, key roles and responsibilities, own role)

Learning outcomes	Teaching content
The Learner will:	Learners must be taught:
	<ul style="list-style-type: none"> • project schedule, i.e. <ul style="list-style-type: none"> ○ activities/tasks to be carried out ○ who is to complete activities/tasks? ○ timeframes for completion of activities/tasks and utilisation of resources (e.g. dependencies, milestones and duration) • budget and costings (e.g. breakdown of salaries, consultancy fees, materials, venues, equipment) • contingency plan (e.g. allow time and budget for project risks and issues) • methods and frequency for communicating project progress to stakeholders • methods for monitoring • methods for evaluation, i.e. <ul style="list-style-type: none"> ○ how to obtain feedback from project stakeholders (e.g. surveys, observation, case studies, focus groups, interviews) ○ when to obtain feedback from project stakeholders (e.g. lessons learnt on completion of stages of project) ○ how project outcomes meet project vision (e.g. benefits received from project outcomes) <p>4.2 Project management tools, i.e.</p> <ul style="list-style-type: none"> • critical path analysis (CPA) • Gantt charts • other tools (e.g. Program Evaluation and Review Technique (PERT), software packages, flow diagrams to plan)

GRADING CRITERIA

LO	Pass	Merit	Distinction
The learner will:	The assessment criteria which are the Pass requirements for this unit.	To achieve a Merit the evidence must show that, in addition to the Pass criteria, the candidate is able to:	To achieve a Distinction the evidence must show that, in addition to the Pass and Merit criteria, the candidate is able to:
1. Understand the stages of project management	P1*: Explain the stages of project management used in a specific business project		
2. Understand the skills project managers need to have	P2*: Explain the skillset a project manager needs to have and why		
3. Understand how and why projects are monitored and factors that influence a project	P3*: Explain how the factors that influence or present a risk to a specific project are monitored	M1: Analyse the factors that influence, and the factors that present a risk to, a specific project and explain the potential impact(s) on the project	D1: Evaluate the effectiveness of the methods used for monitoring a specific project
4. Be able to prepare project plans	P4*: Prepare a project plan for a specific project	M2: Explain how the risks to a specific project could be mitigated	D2: Evaluate the impact on a specific project if contingencies have to be implemented
	P5: Justify the choice of the project plan tool(s) used		

ASSESSMENT GUIDANCE

It is important for learners to have the opportunity to learn and apply their knowledge and skills to meaningful substantial tasks, in order to successfully achieve the unit.

Feedback to learners: you can discuss work-in-progress towards summative assessment with learners to make sure it's being done in a planned and timely manner. It also provides an opportunity for you to check the authenticity of the work. You must intervene if you feel there's a health and safety risk.

Learners should use their own words when producing evidence of their knowledge and understanding. When learners use their own words it reduces the possibility of learners' work being identified as plagiarised. If a learner does use someone else's words and ideas in their work, they must acknowledge it, and this is done through referencing. Just quoting and referencing someone else's work will not show that the learner knows or understands it. It has to be clear in the work how the learner is using the material they have referenced **to inform their** thoughts, ideas or conclusions.

For more information about internal assessment, including feedback, authentication and plagiarism, see the centre handbook. Information about how to reference is in the OCR *Guide to Referencing* available on our website: <http://www.ocr.org.uk/i-want-to/skills-guides/>.

Each learner must be provided with a project for which they are able to produce a plan. It may be possible for more than one learner to independently prepare a plan for the same project. However, they must not collaborate on any of the planning tasks. If learners are working on plans for the same project, this will require careful management from the tutor to ensure there is no duplication of tasks.

Learners should note that project planning tools do not have to be IT-based.

The teaching and evidence required for LO4 P4, prepare a project plan for a specific project and P5, justify the choice of the project plan tool(s) used, are obviously heavily weighted. Centres must teach LO4 thoroughly. The project plan produced for P4 must incorporate all key elements taught in LO4. There is no **requirement** to use more than one tool for P5, although any decision will need to be justified (e.g. why other tools were not chosen).

SYNOPTIC ASSESSMENT

It will be possible for learners to make connections between other units over and above the unit containing the key tasks for synoptic assessment, please see section 6 of the centre handbook for more detail. We have indicated in this unit where these links are with an asterisk and provided more detail in the next section.

*OPPORTUNITIES FOR APPLYING LEARNING ACROSS UNITS

This identifies opportunities for developing links between teaching and learning with other units in the business suite.

Name of other unit and related LO	This unit and specified LO
Unit 1 The business environment LO2 Understand the relationship between businesses and stakeholders	LO3 Understand how and why projects are monitored and factors that influence a project
Unit 2 Working in business LO4 Be able to prioritise business tasks	LO2 Understand the skills project managers need to have
Unit 3 Business decisions LO1 Understand factors to be taken into account when making business decisions	LO3 Understand how and why projects are monitored and factors that influence a project
Unit 4 Customers and communication LO4 Be able to convey messages for business purposes	LO2 Understand the skills project managers need to have
Unit 5 Marketing and market research LO3 Be able to carry out market research for business opportunities	LO3 Understand how and why projects are monitored and factors that influence a project

Name of other unit and related LO	This unit and specified LO
Unit 6 Marketing strategy LO1 Understand the purpose of marketing strategies	LO1 Understand the stages of project management LO4 Be able to prepare project plans
Unit 7 Marketing campaign LO5 Be able to plan marketing campaigns	LO4 Be able to prepare project plans
Unit 15 Change management LO3 Be able to plan for change, manage change and overcome barriers	LO4 Be able to prepare project plans
Unit 20 Business events LO2 Be able to prepare for a business event	LO4 Be able to prepare project plans
Unit 21 Being entrepreneurial – evaluating viable opportunities LO4 Be able to evaluate the viability of opportunities	LO1 Understand the stages of project management
Unit 22 Delivering a business project LO1 Be able to scope a project LO2 Be able to collaborate to deliver a project LO3 Be able to evaluate the effectiveness of the project against its objectives and own contribution towards the project	LO1 Understand the stages of project management LO3 Understand how and why projects are monitored and factors that influence a project LO4 Be able to prepare project plans

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