

# Unit 28: Business Project Management

<b>Unit code:</b>	<b>K/502/5459</b>
<b>QCF Level 3:</b>	<b>BTEC National</b>
<b>Credit value:</b>	<b>10</b>
<b>Guided learning hours:</b>	<b>60</b>

## ● Aim and purpose

The aim of this unit is for learners to understand the stages involved in preparing, planning, managing and evaluating the outcomes of a project. Learners will carry this out by developing a project plan for a selected organisation.

## ● Unit introduction

This first part of this unit introduces the learner to the techniques involved in planning and preparing a project. The administration function invariably involves work tasks to be completed within a defined scope, timescales and budgets. These are in essence projects and can include running a conference, setting up new administrative systems or organising the relocation of a work team. The language of project management has become everyday business language. All projects have a defined life cycle, although the boundaries between the stages are not always clear as project activities often have interdependencies. The basic principles of project planning involve defining and agreeing project deliverables and outcomes, setting milestones for performance and quality, scheduling, and consideration of stakeholder requirements.

The second part of the unit introduces the learner to a range of processes which are used to ensure effective project management. There are various accepted techniques to support the management of projects, including Gantt charts, critical path analysis, risk assessments and contingency planning. Learners will have the opportunity to apply these in a realistic setting. Supporting projects requires excellent communication and time management skills for activities such as setting and monitoring a project budget, solving problems during the project implementation stage and reporting project outcomes.

## ● Learning outcomes

**On completion of this unit a learner should:**

- 1 Understand the purpose, aims and objectives of a project
- 2 Be able to prepare a project plan
- 3 Be able to run a project
- 4 Be able to report project outcomes.

# Unit content

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## 1 Understand the purpose, aims and objectives of a project

*Project:* definition of project; types of project eg scale, formality; project life cycle (definition, planning, implementation, completion and evaluation)

*Purpose, aims and objectives:* defining project (importance to organisation eg improve administrative procedures, improve customer service, develop new products); background research; evaluation criteria

*Stakeholder needs and expectations:* customer; client; beneficiary; workforce; contractors; suppliers; managers; outside agencies and authorities; team members; local community; the role of the project manager and other project roles; project team membership; networks and communication systems

*Legal issues:* types of contract; developing and maintaining contracts

## 2 Be able to prepare a project plan

*Plan:* set objectives; define scope; budgeting; work breakdown; define deliverables; final deadline; key milestones/targets; plan activities; allocate tasks; agree timescales; define resources eg human, physical; clarification of roles and responsibilities; identify dependencies

*Methodologies:* use of schedules; Gantt charts; network flow diagrams; computer software; 'float' time; scope for continuous activity; project balance model (cost, time, specification)

## 3 Be able to run a project

*Implementation and monitoring:* reporting systems; controlling costs; budgets and variance analysis; flow charts; basic statistical analysis; benchmarking; evaluation methods; periodic and milestone evaluation; adjusting targets; team performance evaluation; project handover procedures; use of ICT within project

*Managing time and resources:* planning and scheduling; objectives – time, cost, scope, SMART objectives, feasibility study, cost benefit analysis, risk assessment; schedules; sequencing activities and work breakdown; critical path analysis; basic budgeting; estimating skills; direct and indirect costs; cash flow modelling; contingency planning

*Identifying problems:* risk assessment eg time/not meeting deadlines; resources communication, costings, changes to scope, commitment of project team; sources of advice on problems eg line manager, facilities manager, team members, suppliers

## 4 Be able to report project outcomes

*Review and evaluation:* completion of milestones and outputs; success criteria; comments from third parties; lessons learned; justification of method

*Methods of reporting:* presentations; reports; visual communication eg charts, diagrams;

*conclusions; implications; recommendations eg guidelines, timescale, costing*

## Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
<b>P1</b> outline the stages of the project life cycle for a selected project	<b>M1</b> assess the importance of project management throughout a project's life cycle	<b>D1</b> evaluate the planning of a selected project in terms of meeting purpose, aims and objectives
<b>P2</b> explain the needs and expectations of all stakeholders involved in a selected project		
<b>P3</b> prepare a project plan to include objectives, milestones and individual contributions [IE]		
<b>P4</b> prepare at least two different methods for monitoring project progress	<b>M2</b> compare and contrast project planning methodologies in supporting two contrasting types of project	<b>D2</b> justify methods used to implement a selected project, making recommendations for improvement. [IL]
<b>P5</b> explain how to deal with two problems which might impact on progress for a selected project [CT, RL]	<b>M3</b> analyse the importance of achieving project outcomes within agreed timescales, resources and budgets.	
<b>P6</b> design a suitable reporting method to review outcomes for a given project.		

**PLTS:** This summary references where applicable, in the square brackets, the elements of the personal, learning and thinking skills which are embedded in the assessment of this unit. By achieving the criteria, learners will have demonstrated effective application of the referenced elements of the skills.

Key	IE – independent enquirers CT – creative thinkers	RL – reflective learners TW – team workers	SM – self-managers EP – effective participators

## Essential guidance for tutors

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### Delivery

This unit is intended to be delivered in the workplace or under simulated conditions. Tutors must ensure that sufficient time is provided to support the knowledge and understanding for this unit. If simulations are being used, care must be taken to ensure that learners appreciate the type of organisation in question.

This unit has a great deal of content, and in most programmes it would be beneficial for learners to complete the unit towards the end of the programme so as to build on and consolidate learning from other units. The potential of using the approved project to support other units within the qualification should be explored. Some centres may wish to deliver this unit in conjunction with *Unit 18: Managing a Business Event* as learners could work in a group and use project management methodology in the running of real events.

The project itself should be related to the administration role but, for the purpose of developing knowledge and understanding of project management terminology and methodology, case studies on other diverse projects (such as the building of the Channel Tunnel or the new Wembley Stadium) could be used to demonstrate the appropriateness of the methodologies used. It would be beneficial to learners to have some exposure to realistic business projects so as to fully appreciate the value and importance of project management methodology. In this way they can also begin to appreciate the challenges involved in satisfying a range of stakeholders and that projects of this size are often carried out alongside a range of competing priorities. The role of the project manager should be examined in terms of managing the project from conception through to completion. The negative effects of poor project management, such as small changes in scope, may creep in unnoticed but have implications on cost and timescales.

The use of specialist information technology packages should be encouraged, where possible, to enable learners to develop their use of ICT while completing the project.

Most classroom-based delivery programmes are likely to introduce the concepts and techniques through use of micro projects, such as baking a cake, to help learners apply the concepts to simple situations before moving on to address more complex projects such as planning and holding an event.

The choice of project is a vital part of this unit and tutors should ensure that the learner chooses a realistic, viable and achievable project. Learners should select a defined, discrete and small-scale project, but with an appropriate level of complexity for a Level 3 programme.

There should be several different types of resources, some dependencies, some activities which can be carried out consecutively or concurrently, and several stakeholders. Possible examples could be organising a conference, setting up a new payroll system, setting up the administrative support aspects of a recruitment exercise, or a product launch. This is intended to be a work-based project where project management techniques are used to manage work activities. This not an academic research project.

In delivering and assessing the critical path analysis, learners should be able to understand the principles of identifying critical activities, as appropriate for the type of projects described above. Similarly, the aspects of budgeting are those relating to this type of project. Basic statistical analysis could include gathering data into tables, producing charts and calculating percentages. Distribution curves or regression analysis do not need to be included.

## Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction to the unit. Whole class
Introduction to projects. Tutor input with examples. Whole class
Types, scale, formality life cycle of projects
Purpose, aims and objective of projects
Stakeholders needs and expectations
Legal issues
Case study on a project in small groups
Preliminary project choices with whole class discussion
<b>Assignment 1: Stages of the Project Life Cycle</b>
Preparing a project plan. Tutor input with examples, eg Wembley Stadium -whole class
Planning the project
Methodologies
Exercises on methodologies in pairs
In pairs research Wembley Stadium websites
Pairs feed back to whole class on research findings
Visiting speaker on planning a project
Case study on project planning in small groups
Preparing oral presentations
Giving oral presentations with question and answer sessions
Finalise and confirm project choices. Whole class
<b>Assignment 2: Prepare a Project Plan: Whole class</b>
Visiting speaker on preparing a project
Running a project. Tutor input with examples, eg London Olympics. Whole class
Tutor input (supported by group work exercises and case studies)
Implementing and monitoring projects
Managing time and resources
Identifying problems
Pair work – websites research exercise, eg London Olympics
Research findings on the London Olympics project. Pair feedback and whole-class discussion

## Topic and suggested assignments/activities and/assessment

Introduction to reporting project outcomes. Whole class

Review and evaluation

Methods of reporting

Pair work on project reports from the internet

Research

Pair feedback to whole class

Visiting speaker – reporting project outcomes

Supervised assignment time

Non-supervised study time and completion of assignments

## Assessment

Ideally, learners would base their work for this unit on a real work-based project which they have some responsibility for as part of their work role. If this is not possible, learners could produce a project plan based on their assignment work for all their units for this qualification. Assessment evidence could include:

- a project plan
- records of meetings and reports
- records of methodology used for implementing and monitoring a project
- a project diary or evaluation of project outcomes.

Learners can provide records to show how they have evaluated and implemented improvements through supporting projects. These can be witness testimonies, tutor observations, or a logbook kept by the learner. This unit gives learners with the opportunity to develop functional skills evidence through their learning activities. This could be through their research, formal presentations, discussions and written submissions of their findings.

For P1, learners must outline what constitutes a project, identify a project and explain what happens at each stage of the project life cycle, including estimated timescales for each stage. It is anticipated that the selected project for this criterion will be a case study, as the purpose is to develop knowledge of the project life cycle to help learners in planning their own project for P3. The evidence can be in the form of a report or presentation.

For P2, learners must provide evidence of researching a range of different needs and expectations of stakeholders involved in a project, including the role of the project manager.

For P3, learners must prepare a project plan and define its relevance to meeting organisational objectives. This will include setting the overall purpose of the project, aims and objectives, timescales and resources, the likely outputs, and the evaluation criteria. The evidence is likely to be in the form of a presentation or formal report.

For P4, learners must prepare at least two different methods of monitoring project progress. Examples could be a Gantt chart and critical path diagram, prepared either manually or electronically, and showing how the activities on the critical path are going to be monitored. Learners must also describe how the project balance model helps with decision making.

For P5, learners must demonstrate an understanding of dealing with unexpected events. They must identify types of problem, including time, resources, and costs, describing their impact on the outcomes, and commenting on how these can be overcome. They must know the procedures to follow if they have concerns regarding these requirements. Evidence can be in the form of records, diary logs and a written account.

For P6, learners must provide evidence of measuring the project outcomes and showing whether these have been met. This can be achieved through a structured project report supported by diagrams or charts.

For M1, learners can draw on their evidence for P1 and P2 and, giving examples, examine the impact on each of the stages of the project if it is poorly managed.

For M2, learners must extend their knowledge of tools for project planning and explain how these contribute to managing different types of project. Learners can draw on their evidence for P4 and use examples of different types of project, such as large complex projects and small informal projects.

For M3, learners can draw on their evidence for P5 and P6. As evidence, they must provide a contingency strategy for dealing with major deviations from the project plan. This will enable them to identify the relevance of the project balance model.

For D1, learners must extend their evidence for M1 and M2 by demonstrating their depth of knowledge and understanding. They must evaluate their project planning in terms of their experience of the project so that they are able to apply lessons learned to future projects.

For D2, learners can develop the evidence produced for M2 and M3. They must make justified recommendations for the effectiveness of the methodology used for the project life cycle.

### Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the pass, merit and distinction criteria in the grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1, M1	Stages of the Project Life Cycle	Case study: You are acting as an adviser to a medium-sized business on a project proposal that they have unveiled. You have been asked to explain the stages of the project life cycle and to provide them with an assessment of the importance of project management throughout the project's life cycle.	Oral presentation with supporting documentation.
P2, P3, P4, P5, P6 M2, M3 D1, D2	Prepare a Project Plan	In consultation with a selected organisation you are required to identify a project and prepare a detailed project plan for them covering the life cycle of the project.	Report to include: <ul style="list-style-type: none"> <li>research evidence</li> <li>appropriate charts</li> <li>records of meetings</li> <li>records of methodology used for implementation and monitoring</li> <li>a project diary or evaluation on project outcomes</li> </ul>

## Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the BTEC Business sector suite. This unit has particular links with the following unit titles in the Business suite:

Level 3	
The Business Environment	Managing a Business Event
Business Resources	Supporting Business Activities
Introduction to Marketing	Understanding Health and Safety in the Business Workplace
Business Communication	

This unit also links to the following Level 3 National Occupational Standards.

Business and Administration:

- Unit 309: Run Projects.

Management and Leadership:

- Unit F01: Manage a project.

### Essential resources

Learners will need access to various organisations in order to prepare a project plan. They will also need access to ITC to conduct web-based research.

### Employer engagement and vocational contexts

Learners will be encouraged to use their own organisation as a resource for preparing a project plan. Learners will also require access to research facilities and the internet. Guest speakers with experience of project management can provide a valuable input to support the underpinning knowledge and understanding of the unit.

### Indicative reading for learners

#### Textbooks

Baker S and Baker K – *The Complete Idiot's Guide to Project Management* (Alpha Books, 2000)  
ISBN 0028639200

Carysforth C and Rawlinson M – *NVQ Level 3 and Technical Certificate Business and Administration*  
(Heinemann, 2006) ISBN 0435463349

Horine G – *Absolute Beginner's Guide to Project Management* (Que Publishing, 2005) ISBN 0789731975

#### Website

[www.apm.org.uk](http://www.apm.org.uk)

Association for Project Management

## Delivery of personal, learning and thinking skills

The table below identifies the opportunities for personal, learning and thinking skills (PLTS) that have been included within the pass assessment criteria of this unit.

Skill	When learners are ...
<b>Independent enquirers</b>	<p>identifying questions to answer and problems to resolve when preparing a project plan in an organisation</p> <p>analysing and evaluating information for the project plan and judging its relevance and value</p> <p>evaluating the planning of their project plan, justifying the methods they have chosen and making recommendations for improvement</p>
<b>Creative thinkers</b>	asking questions in the organisation to extend their thinking about their approach to the project plan
<b>Reflective learners</b>	reviewing progress on their project plan and acting on the outcomes.

Although PLTS are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
<b>Independent enquirers</b>	exploring issues, events or problems, from different perspectives arising from case studies and website research on different projects
<b>Creative thinkers</b>	trying out alternative methodologies and approaches to their project plan and following the ideas through
<b>Reflective learners</b>	assessing themselves and others in group work discussions on planning to identify opportunities and achievements
<b>Team workers</b>	<p>collaborating with others when working on project-based case studies in groups</p> <p>provide constructive support and feedback to others on oral presentations on project plans</p>
<b>Self-managers</b>	organising time and resources, prioritising actions when working on the project plan for an organisation
<b>Effective participators</b>	Working and communicating effectively with others.

## ● Functional Skills – Level 2

Skill	When learners are ...
<b>ICT – Use ICT systems</b>	
Manage information storage to enable efficient retrieval	writing and saving their assignment work
<b>ICT – Find and select information</b>	
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	using websites to research information
<b>Mathematics</b>	
Select and apply a range of skills to find solutions	using charts, diagrams, cash flow techniques and budgets in their project plan
Use appropriate checking procedures and evaluate their effectiveness at each stage	checking Gantt charts, network flow diagrams and budgets for the project plan
<b>English</b>	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	participating in pairs or small groups to discuss issues related to project planning
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	reading textbooks, journals, newspapers and web pages related to project planning
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively	writing a project plan.