Design a concept for a major event or function

D1.HCA.CL3.02

Assessor Manual

Australian Aid
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William Angliss Institute
Specialist centre for foods, tourism & hospitality

Design a concept for a major event or function

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Assessor Manual

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

All text is produced by William Angliss Institute of TAFE for the ASEAN Project on “Toolbox Development for Front Office, Food and Beverage Services and Food Production Divisions”.

This publication is supported by the Australian Government’s aid program through the ASEAN-Australia Development Cooperation Program Phase II (AADCP II).

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File name: AM_Design_a_concept_for_a_major_event_FN_020214

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Competency Based Assessment (CBA) – An Introduction for Assessors

Assessment is the process of identifying a participant's current knowledge, skills and attitudes sets against all elements of competency within a unit of competency.

Suggested Assessment Methods

For each unit of competency a number of assessment tools have been identified including:

- Work Projects
- Oral Questions
- Written Questions
- Third Party Statements
- Observation Checklists.

Instructions and Evidence Recording Sheets have been identified in this Assessment Manual for use by Assessors.

Alternative Assessment Methods

Whilst the above mentioned assessment methods are suggested assessment methods, the assessor may use an alternate method of assessment taking into account:

a) The nature of the unit
b) The strengths of participants
c) The number of participants in the class
d) Time required to complete assessments
e) Time dedicated to assessment
f) Equipment and resources required.

Alternate assessment methods include:

- Practical demonstrations
- Practical demonstrations in simulated work conditions
- Problem solving
- Portfolios of evidence
- Critical incident reports
- Journals
- Oral presentations
- Interviews
- Videos
- Visuals/slides/audiotapes
- Case Studies
- Log books

- Projects and Role plays
- Group projects
- Recognition of Prior Learning.

Whilst there is no specific instruction or evidence collection documents for all the alternative assessment methods, assessors can record competency in the 'Other' section within the 'Competency Recording Sheet'.

Selection of Assessment Methods

Each assessor will determine the combination of Assessment Methods to be used to determine Competency for each Competency Unit on a student by student basis.

'Sufficient' evidence to support the 'Pass Competent'/'Not Yet Competent' decision must be captured.

In practice this means a minimum of 2 – 3 Assessment Methods for each candidate for each Competency Element is suggested.

At least one method should provide evidence of practical demonstration of competence.

The following assessment methods deemed to provide evidence of practical demonstration of competence include:

- Practical Work Projects
- Third Party Statement
- Observation Checklist.

Assessing Competency

Competency based assessment does not award grades, but simply identifies if the participant has the knowledge, skills and attitudes to undertake the required task to the specified standard.

Therefore, when assessing competency, an assessor has two possible results that can be awarded:

- 'Pass Competent' (PC)
- 'Not Yet Competent' (NYC).

Pass Competent (PC)

If the participant is able to successfully answer or demonstrate what is required, to the expected standards of the performance criteria, they will be deemed as 'Pass Competent' (PC).

The assessor will award a 'Pass Competent' (PC) if they feel the participant has the necessary knowledge, skills and attitudes in all assessment tasks for a unit.

Not Yet Competent' (NYC)

If the participant is unable to answer or demonstrate competency to the desired standard, they will be deemed to be 'Not Yet Competent' (NYC).

This does not mean the participant will need to complete all the assessment tasks again. The focus will be on the specific assessment tasks that were not performed to the expected standards.

The participant may be required to:

a) Undertake further training or instruction

b) Undertake the assessment task again until they are deemed to be 'Pass Competent'.

Regional Qualifications Framework and Skills Recognition System

The 'Regional Qualifications Framework and Skills Recognition System', also known as the 'RQFSRS' is the overriding educational framework for the ASEAN region.

The purpose of this framework is to provide:

- A standardised teaching and assessment framework
- Mutual recognition of participant achievement across the ASEAN region. This includes achievement in individual Units of Competency or qualifications as a whole.

The role of the 'RQFSRS' is to provide, ensure and maintain 'quality assurance' across all countries and educational providers across the ASEAN region.

Recognition of Prior Learning (RPL)

Recognition of Prior Learning is the process that gives current industry professionals who do not have a formal qualification, the opportunity to benchmark their extensive skills and experience against the standards set out in each unit of competency/subject.

This process is a learning and assessment pathway which encompasses:

- Recognition of Current Competencies (RCC)
- Skills auditing
- Gap analysis and training
- Credit transfer.

Code of Practice for Assessors

This Code of Practice provides:

- Assessors with direction on the standard of practice expected of them
- Candidates with assurance of the standards of practice expected of assessors
- Employers with assurance of the standards maintained in the conduct of assessment.

The Code detailed below is based on the International Code of Ethics and Practice (The National Council for Measurement in Education [NCME]):

- The differing needs and requirements of the person being assessed, the local enterprise and/or industry are identified and handled with sensitivity
- Potential forms of conflict of interest in the assessment process and/or outcomes are identified and appropriate referrals are made, if necessary
- All forms of harassment are avoided throughout the planning, conducting, reviewing and reporting of the assessment outcomes
- The rights of the candidate are protected during and after the assessment
- Personal and interpersonal factors that are not relevant to the assessment of competency must not influence the assessment outcomes
- The candidate is made aware of rights and process of appeal

- Evidence that is gathered during the assessment is verified for validity, reliability, authenticity, sufficiency and currency
- Assessment decisions are based on available evidence that can be produced and verified by another assessor
- Assessments are conducted within the boundaries of the assessment system policies and procedures
- Formal agreement is obtained from both the candidate and the assessor that the assessment was carried out in accordance with agreed procedures
- The candidate is informed of all assessment reporting processes prior to the assessment
- The candidate is informed of all known potential consequences of decisions arising from an assessment, prior to the assessment
- Confidentiality is maintained regarding assessment results
- The assessment results are used consistently with the purposes explained to the candidate
- Opportunities are created for technical assistance in planning, conducting and reviewing assessment procedures and outcomes.

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

- Assessment should be conducted at a scheduled time that has been notified to the candidate
- Facilitators must ensure participants are made aware of the need to complete assessments and attend assessment sessions
- If a participant is unable to attend a scheduled session, they must make arrangements with the Assessor to undertake the assessment at an alternative time
- At the end of the assessment the Assessor must give feedback and advise the participant on their PC/NYC status
- Complete the relevant documentation and submit to the appropriate department.

Preparation

- Gain familiarity with the Unit of Competency, Elements of Competency and the Performance Criteria expected
- Study details assessment documentation and requirements
- Brief candidate regarding all assessment criteria and requirements.

Briefing checklist

- Begin the assessment by implementing the following checklist and then invite the candidate to proceed with assessment.

Checklist for Assessors

	Tick (✓)	Remarks
Prior to the assessment I have:		
Ensured the candidate is informed about the venue and schedule of assessment.		
Received current copies of the performance criteria to be assessed, assessment plan, evidence gathering plan, assessment checklist, appeal form and the company's standard operating procedures (SOP).		
Reviewed the performance criteria and evidence plan to ensure I clearly understood the instructions and the requirements of the assessment process.		
Identified and accommodated any special needs of the candidate.		
Checked the set-up and resources for the assessment.		
During the assessment I have:		
Introduced myself and confirmed identities of candidates.		
Put candidates at ease by being friendly and helpful.		
Explained to candidates the purpose, context and benefits of the assessment.		
Ensured candidates understood the assessment process and all attendant procedures.		
Provided candidates with an overview of performance criteria to be assessed.		
Explained the results reporting procedure.		
Encouraged candidates to seek clarifications if in doubt.		
Asked candidates for feedback on the assessment.		
Explained legal, safety and ethical issues, if applicable.		
After the assessment I have:		
Ensured candidate is given constructive feedback.		
Completed and signed the assessment record.		
Thanked candidate for participating in the assessment.		

Instructions for Recording Competency

Specifications for Recording Competency

The following specifications apply to the preparation of Evidence Gathering Plans:

- A Competency Recording Sheet must be prepared for each candidate to ensure and demonstrate all Performance Criteria and Competency Elements are appropriately assessed. This Sheet indicates how the Assessor will gather evidence during their assessment of each candidate
- This Competency Recording Sheet is located at the end of the Assessment Plan
- It is the overriding document to record competency
- The Assessor may vary the Competency Recording Sheet to accommodate practical and individual candidate and/or workplace needs
- Assessor must place a tick (✓) in the 'Assessment Method' columns to identify the methods of assessment to be used for each candidate
- Multiple Competency Elements/Performance Criteria may be assessed at the one time, where appropriate
- The assessor and participant should sign and date the Competency Recording Sheet, when all forms of evidence and assessment have been completed
- The assessor may provide and feedback or clarify questions which the participant may have in regards to the assessment grade or findings
- All documents used to capture evidence must be retained, and attached to the Competency Recording Sheet for each candidate for each Competency Unit.

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

The work projects identified in the Training Manuals involve a range of tasks, to be performed at the discretion of the Assessor.

Work project tasks can be completed through any form of assessment as identified in the Trainer and Trainee Manuals and stated at the start of this section.

Assessors should follow these guidelines:

- Review the Work Projects at the end of each 'Element of Competency' in the Trainee Manual to ensure you understand the content and what is expected
- Prepare sufficient resources for the completion of work activities including:
  - Time – whether in scheduled delivery hours or suggested time participants to spend outside of class hours
  - Resources – this may involve technical equipment, computer, internet access, stationery and other supplementary materials and documents
- Prepare assessment location (if done in class) making it conducive to assessment
- Explain Work Projects assessment to candidate, at the start of each Element of Competency. This ensures that participants are aware of what is expected and can collate information as delivery takes place

- Assessors can use the following phrase as a guide (where an 'X' is identified, please input appropriate information):

  "At the end of each Element of Competency there are Work Projects which must be completed. These projects require different tasks that must be completed.

  These work projects are part of the formal assessment for the unit of competency titled X:

  - You are required to complete these activities:

    a) *Using the 'X' method of assessment*

    b) *At 'X' location*

    c) *You will have 'X time period' for this assessment*

  - You are required to compile information in a format that you feel is appropriate to the assessment
  - Do you have any questions about this assessment?"
- Commence Work Project assessment:
  - The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
  - Participants complete work projects in the most appropriate format
  - Participants must submit Work Project evidence to the assessor before the scheduled due date
- Assessor must assess the participant's evidence against the competency standards specified in each Element of Competency and their own understanding. The assessor can determine if the participant has provided evidence to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

- Prepare Assessment Record for Oral Questioning. One record for each candidate:
  - Enter Student name
  - Enter Assessor name
  - Enter Location
- Familiarise self with Questions to be asked
- Prepare assessment location (table and chairs) making it conducive to assessment

- Explain Oral Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These oral questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability and I will record whether or not you have answered correctly.

  We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"
- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:

    a) Ticking PC or NYC, as appropriate

    b) Entering 'Remarks' as required

    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

- Familiarise self with Questions and Answers provided
- Print and distribute copies of 'Written Questions' for participants. Ideally this should take place with adequate time for participants to answer all questions before the expected due date
- Explain Written Questioning assessment to candidate, using the following phrase as a guide (where a 'X' is identified, please input appropriate information):

  "These written questions are part of the formal assessment for the unit of competency titled X.

  There are X questions and you are required to answer all of them to the best of your ability.

  You may refer to your subject materials, however where possible try to utilise your existing knowledge when answering questions.

  Where you are unsure of questions, please ask the Assessor for further instruction. This may be answering the question orally or asking the assessor to redefine the question.

  We have X time for this assessment:

  - The due date for completion of this assessment is X
  - On this date you must forward the completed questions to the assessor by X time on the date of X
  - Do you have any questions about this assessment?"

- The assessor may give time for participants to review the questions at this time to ensure they understand the nature of the questions. The assessor may need to clarify questions
- Participants may record written answers (where possible)
- Participants must submit the written answers to the assessor before the scheduled due date
- Assessor must assess the participant's written answers against the model answers provided as a guide, or their own understanding. The assessor can determine if the participant has answered the questions to a 'competent' standard
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Observation Checklist

These specifications apply to the use of the Observation Checklist in determining competency for candidates.

Only an approved assessor is authorised to complete the Observation Checklist.

The assessor is required to observe the participant, ideally in a simulated environment or their practical workplace setting and record their performance (or otherwise) of the competencies listed on the Observation Checklist for the Competency Unit.

To complete the Observation Checklist the Assessor must:

- Insert name of candidate
- Insert assessor name
- Insert identify of location where observations are being undertaken
- Insert date/s of observations – may be single date or multiple dates
- Place a tick in either the 'Yes' or 'No' box for each listed Performance Criteria to indicate the candidate has demonstrated/not demonstrated that skill
- Provide written (and verbal) feedback to candidate – as/if appropriate
- Sign and date the form
- Present form to candidate for them to sign and date
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Observation Checklist.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the participant.

Specifications for Third Party Statement

These specifications relate to the use of a relevant workplace person to assist in determining competency for candidates.

The Third Party Statement is to be supplied by the assessor to a person in the workplace who supervises and/or works closely with the participant.

This may be their Supervisor, the venue manager, the Department Manager or similar.

The Third Party Statement asks the Supervisor to record what they believe to be the competencies of the participant based on their workplace experience of the participant. This experience may be gained through observation of their workplace performance, feedback from others, inspection of candidate's work etc.

A meeting must take place between the Assessor and the Third Party to explain and demonstrate the use of the Third Party Statement.

To complete the Third Party Verification Statement the Assessor must:

- Insert candidate name
- Insert name and contact details of the Third Party
- Tick the box to indicate the relationship of the Third Party to the candidate
- Present the partially completed form to the Third Party for them to finalise
- Collect the completed form from the Third Party
- Transcribe results/details to Competency Recording Sheet for candidate
- Forward/file Third Party Statement.

The Third Party must:

- Record their belief regarding candidate ability/competency as either:
  - Pass Competent = Yes
  - Not Yet Competent = No
  - Unsure about whether candidate is competent or not = Not Sure
- Meet briefly with the assessor to discuss and/or clarify the form.

This source of evidence combines with other forms of assessment to assist in determining the 'Pass Competent' or 'Not Yet Competent' decision for the candidate.

A separate Third Party Statement is required for each Competency Unit undertaken by the candidate.

Competency Standard

<table>
<tr><td>UNIT TITLE: DESIGN A CONCEPT FOR A MAJOR EVENT OR FUNCTION</td><td>NOMINAL HOURS: 35</td></tr>
<tr><td colspan="2">UNIT NUMBER: D1.HCA.CL3.02</td></tr>
<tr><td colspan="2">UNIT DESCRIPTOR: This unit deals with the skills and knowledge required to design a concept for a major event or function in a range of settings within the food production labour division of the hotel and travel industries</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td>UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>
Element 1: Identify key objectives of event
1.1 Clarify key objectives of event in consultation with customer/s and/or key stakeholders
1.2 Identify and analyse key information in consultation with customer/s and/or key stakeholders and other relevant parties
1.3 Identify and analyse factors which might impact on the event
Element 2: Establish concept, theme and format of event
2.1 Meet both customer needs and expectations in accordance with organisation standards, policies and procedures and within acceptable time frames
2.2 Develop an overall event concept, theme and format which reflects key objectives agreed upon with customer/s and/or key stakeholders
</td><td>
Unit Variables
The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment
This unit applies to designing a concept for a major event or function in a range of outlets within the labour divisions of the hotel and travel industries and may include:
1. Food Production.
Stakeholders may include:
• Event principal
• Local community
• Organising committees
• Local authorities
• Staging contractors
• Colleagues.
</td></tr>
</table>

2.3 Verify practicality and viability of concept, theme and format through a sound process of consultation and analysis **2.4** Identify logistical requirements of overall concept, theme and format **2.5** Obtain relevant approval from customer/s and/or stakeholders prior to implementation **Element 3: Prepare a concept plan** **3.1** Document theme and operational context of the event or function **3.2** Document *elements* of the total concept agreed to by customer/s and/or stakeholders **3.3** Gain *written agreement* from customer/s and/or stakeholders	*Key information* may be related to: • Size and numbers of guests/delegates • Requirements of all relevant parties • Location/s • Duration • Resource issues, e.g. Spatial requirements of the site/venue, environmental conditions, budget • Purpose of function or event, e.g. wedding, convention, corporate function, ball. *Relevant parties* may include: • Venue staff and management • Caterers • Security • Musicians • Florists • Decorators • Exhibitors • Contractors. *Factors* may include: • Resource availability, e.g. Human, financial, physical • Potential for attracting additional resources, e.g. Sponsorship, co-hosting • Lead time restrictions • Potential levels of participation and interest

	• Competitive environment • Timing and duration factors, e.g. Impact of public holidays and/or other public events • Potential contributors • Talent requirements • Climate • Access factors, e.g. Physical access, access times/availability, internal/external location • Marketing and promotional issues, e.g. Media coverage. *Organisation standards, policies and procedures* may include: • Complaints procedures • Organisational standard report forms • Job descriptions • Code of ethics • Quality systems, standards and guidelines. *Elements* may include: • Venue decoration, e.g. Stage set up, design, props, decoration • Venue plan, e.g. Seating, lighting, stage set up • Catering • Talent • Technical effects, e.g. Sound, lighting, audio-visual. *Written agreement* may include: • Formal purchase order • Formal contracts

	• Letters of agreement • Memorandums of understanding. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Ability to identify and work with key stakeholders for different types of events • Ability to identify all factors that impact on the planning, construction and staging of an event or function • Ability to design creative options for different types of events • Ability to communicate effectively with a range of people relevant to position and role • Ability to liaise and negotiate with the customer and other relevant parties to the event/function to develop the overall concept, theme and format of the event or function. **Linkages To Other Units** • Apply catering control principles and procedures • Prepare tenders for catering contracts • Establish and maintain a business relationship • Develop and implement a business plan • Gather and present product information • Manage financial performance within budget. **Critical Aspects of Assessment** Evidence of the following is essential: • Demonstrated ability to identify factors which impact on the planning, construction and staging of an event or function

	• Demonstrated ability to liaise and negotiate with the customer and other stakeholders in the event to develop the overall concept, theme and format of the event or function • Demonstrated ability to develop a concept, theme and format that reflects the key objectives agreed upon by the customer/s and/or key stakeholders • Demonstrated ability to develop a concept, theme and format that is operationally practical • Demonstrated ability to consider a range of creative options when developing a concept, theme and format of an event or function. **Context of Assessment** This unit may be assessed on or off the job • Assessment should include practical demonstration of the ability to design a concept for a major event or function either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge • Assessment must relate to the individual's work area, job role and area of responsibility. **Resource Implications** Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment. **Assessment Methods** The following methods may be used to assess competency for this unit: • Case studies • Observation of practical candidate performance • Oral and written questions • Portfolio evidence • Problem solving • Role plays

	• Third party reports completed by a supervisor • Project and assignment work. **Key Competencies in this Unit** *Level 1 = competence to undertake tasks effectively* *Level 2 = competence to manage tasks* *Level 3 = competence to use concepts for evaluating*

Key Competencies	Level	Examples
Collecting, organising and analysing information	2	Identify customer requirements and key factors influencing the development of the event concept
Communicating ideas and information	2	Use positive communication techniques to 'sell' proposed concepts
Planning and organising activities	2	Identify the most appropriate way to respond to customer requests
Working with others and in teams	2	Work with relevant parties to plan concept
Using mathematical ideas and techniques	0	
Solving problems	2	Apply conflict resolution and communication skills to resolve conflict(s) and/or misunderstandings
Using technology	0	

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Design a concept for a major event or function D1.HCA.CL3.02
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. Who are key stakeholders that are involved in planning, preparing or conducting an event or function?		
2. What different room layouts can be used for functions?		

Questions	Response	
	PC	NYC
3. Why is co-hosting and sponsorship good ways to generate additional resources for a function or event?		
4. What is the purpose of having a 'Code of Ethics'?		
5. Why is an Event Brief an important document for staff members?		

Questions	Response	
	PC	NYC
6. Why is it important to consult with internal stakeholders when preparing an Event proposal?		
7. What are some logistical considerations in terms of planning staffing for an event or function?		
8. Why is it important to be able to clearly identify and explain costs in a proposal?		

Questions	Response	
	PC	NYC
9. What other documents should be sent along with a proposal to a prospective client?		
10. What is the purpose of a 'Function Running Sheet'? What information is included in the Sheet?		
11. What is the purpose of 'Booking Conditions' and what information is normally included in these conditions?		

Written Questions

Design a concept for a major event or function – D1.HCA.CL3.02

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. What are different types of events of functions that can be held?

2. What are some objectives for holding an event of function?

3. What key information is taken in relation to the client's requirements for an event?

4. What are examples of external providers that may be used for an event or function?

5. What are some common resources required for a function or event?

6. What are some considerations when deciding to hold events with short notice?

7. What are examples of organisational standard report forms used when planning or conducting events?

8. What are some company policy documents used to guide functions and events?

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9. What is the purpose of an event brief?

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10. What information is normally included in an event brief?

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11. What types of assistance can internal stakeholders provide when preparing a proposal?

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12. What different stakeholders may be involved in the lead up to an event and for what reason?

13. What are some considerations when choosing a venue or location for an event?

14. What are event factors that may impact on catering?

15. What are factors to take into account when developing a costing?

16. Why is it important to double-check your financial figures before sending a proposal to a client? What would you check?

17. What should be included in an event proposal?

18. Why is it important to follow up a proposal after sending it?

19. What is the purpose on an ‘Event Management Plan’ and what information is included in this document?

20. What information is normally contained within an ‘Event Contract’?

Answers to Written Questions

Design a concept for a major event or function – D1.HCA.CL3.02

The following are model answers only – Trainers/Assessors must use discretion when determining whether or not an answer provided by a Student is acceptable or not.

1. **What are different types of events of functions that can be held?**

   Answers will vary.

2. **What are some objectives for holding an event of function?**

   There are many overall objectives for holding an event, some of which include:

   - Increased revenue and profit to a department
   - Increased brand awareness in the market place
   - Expanding the range of products or services provided by an organisation
   - Promoting new products or services
   - Reinforcing or cementing success of organisation.

3. **What key information is taken in relation to the client's requirements for an event?**

   - A specific day and date
   - Style and format of function
   - Location
   - Timing and duration considerations
   - Food and beverage
   - Accommodation
   - Entertainment
   - Specialist technology services
   - Equipment
   - Ancillary services and rooms
   - Guest numbers
   - Privacy
   - Budget
   - Security
   - Themes and decorations
   - External providers.

4. What are examples of external providers that may be used for an event or function?

- Florists
- Photographers
- Party Hire companies – for trestles, extra crockery, cutlery, glassware, chair covers, seating, decorations
- Entertainers – bands, disc jockeys, solo performers etc.
- Suppliers of rental technical equipment for audio and visual needs
- Printers – for personalised stationary, menus, signage and decoration needs
- Security agencies – for extra security staff
- Employment agencies – for additional waiting, bar, service and cooking staff
- Business support services – such as interpreters, translators, secretarial support
- Transportation – including chauffers, limousines, private cars or buses for tours
- Clowns and animals.

5. What are some common resources required for a function or event?

- Location/premises
- Occupational health and safety (OH&S) resources
- Equipment
- Raw materials
- Stock and supplies
- Technical equipment and software
- Staffing.

6. What are some considerations when deciding to hold events with short notice?

The ability to:

- Provide sufficient amounts of meeting or event rooms
- Provide sufficient amounts of accommodation rooms
- Arrange staff to coordinate the event
- Source sufficient food and beverage supplies
- Source other resources.

7. What are examples of organisational standard report forms used when planning or conducting events?

- Event Brief
- Contract
- Booking Conditions
- Confirmation Forms
- Function Running Sheets
- Catering Operational Plan
- Catering Running Sheet
- Invoices and Accounts
- Customer Comment and Feedback Forms.

8. What are some company policy documents used to guide functions and events?

- Checklists – clearly indicates the tasks to be performed
- Performance Indicators - the expected level of desired performance
- Policies - a rule or guideline of expected performance
- Procedures - a specified step by step guide how an activity is to be conducted
- SOPs – Standard Operating Procedures.

9. What is the purpose of an event brief?

An event brief is the template which contains all necessary information relating to a catered event or function.

10. What information is normally included in an event brief?

- Agreed event details including concept, theme, format and protocols
- Identification of stakeholders and their individual roles
- Allocation of responsibilities and setting of milestones and task completion dates
- Type of function – wedding, launch of product, ball
- Name, address, and contact number of client
- Day, date and time of the function
- Rooms and locations where the function will be held
- Costings where determined
- Billing instructions – who gets the bill, their address
- Menu – break-down course-by-course of the agreed dishes including specification of ‘on arrival’ food, morning and afternoon teas
- Beverage arrangements – description and quantities of beverages to be provided
- Sequence of service – covering timing of service, and details of when speeches and presentations will occur
- Entertainment – details of bands and the order of ceremony
- Room set up – number of tables, floor plan, decorations, table set-ups (cutlery, crockery and table accoutrements)
- Type of service – plated, tray, buffet, silver service, finger food
- Special requirements.

11. What types of assistance can internal stakeholders provide when preparing a proposal?

There are many types of assistance that may be required, either to be given or received, by different stakeholders in a function, including:

- Seeking advice or suggestions
- Confirming information
- Updating them about preparations and purchases
- Undertaking logistical activities and arrangements
- Assisting them to meet function requirements.

12. What different stakeholders may be involved in the lead up to an event and for what reason?

- Food requirements discussed with Executive Chef
- Beverage requirements discussed with Beverage Manager
- Technical requirements discussed with Maintenance Department or outside suppliers
- Linen requirements discussed with housekeeping. Outside suppliers may also be involved
- Room decorations and floral arrangements discussed with housekeeping or outside suppliers
- Facility set-up requirements discussed with Catering and Food and Beverage or functions coordinator
- Security information and requirements discussed with the Security Department
- Arrival and departure information discussed with Front Office Department.

13. What are some considerations when choosing a venue or location for an event?

- Location in relation to office, public transport or potential audience
- Indoor/outdoor
- Venue quality or brand
- Space
- Reputation
- Aesthetic appeal
- Accommodation
- Venue facilities and services
- Cost.

14. What are event factors that may impact on catering?

- Available budget
- Dates and time of function
- Numbers of participants
- Speed of service required due to timing demands on activities within an event
- Types of food required
- Service styles required
- Cuisines preferred
- Location of event
- Seasonal influences
- Nature of event
- Production and transport issues
- General logistics
- Staffing
- Pre and post function activities.

15. What are factors to take into account when developing a costing?

- Follow house policies
- Make sure everything is charged for
- Only include services and products the client has requested
- Double-check your figures
- Identify and explain every charge.

16. Why is it important to double-check your financial figures before sending a proposal to a client? What would you check?

This need to check and double-check applies to:

- In-house charges – for accommodation rooms, provision of in-house services (spa treatments, room hire, use of nominated facilities)
- Goods and services to be provided by external providers – always check with suppliers to get up to date and accurate quotes from them regarding goods and services they are to provide
- Confirming house policy regarding charging for third party suppliers. Where the venue is using external providers to supply nominated goods and services you must know what the venue policy is regarding how these charges are to be passed on to the client. Some venues may charge these out 'at cost' and some may add a certain percentage as a fee to cover the time involved in arranging things
- Arithmetic calculations. You must check all your additions, extensions etc. are correct.

17. What should be included in an event proposal?

- Details of all catering proposed – including menus, drinks, timing, service times
- Costs
- Options available within designated budget parameters
- Overview of production, transportation and service of food and beverages
- Staff numbers
- Reference to previous events that have been catered for on the same/similar scale.

18. Why is it important to follow up a proposal after sending it?

- If they received the proposal
- If you can be of further assistance
- If you would like to confirm the booking
- This enables the Event Contract to be prepared
- Explain Method Of Payment.

19. What is the purpose on an 'Event Management Plan' and what information is included in this document?

Event management plan should address planning and preparation issues focusing on event implementation such as:

- Staffing requirements
- Security
- Management of external contractors
- Running sheets
- Briefing papers
- Staging elements or requirements – including set ups, rigging, room preparation, seating, tables, audio visual equipment, catering, security, sound and lighting displays and signage
- Catering arrangements – as specified in the event catering plan
- Liaison with stakeholders, dignitaries, delegates and guests, media, sponsors
- Guest/delegate management on arrival, during the event and on departure
- Risk management
- Emergency management
- Performance standards and guidelines
- Traffic management, including vehicular control and foot traffic within the venue/site
- Specification of control, command and communication structures including lines of authority,
- Scopes of responsibility, identification of key contact details for event managers
- Use of technology

- Timing and co-ordination of services, facilities
- Contingency plans including contingency plans for adverse weather, and other identified high medium level potential risks.

20. What information is normally contained within an 'Event Contract'?

- Full contact details of the client
- Dates and times of the function
- Date for notification of final numbers
- Type of function
- Service style
- Seating arrangements
- Equipment
- Location of the function, name of rooms and facilities to be used
- Approximate numbers attending
- Décor, displays and table decorations
- Food to be served including when, type and amount
- Beverages to be served
- Entertainment, activities and inclusions
- Ancillary sales
- Services and facilities the venue has agreed to provide at no charge
- Technology required
- Access required by the client prior to the function
- Products and services the client will be supplying
- Involvement of third party suppliers
- Total cost of function.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Design a concept for a major event or function D1.HCA.CL3.02
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Identify key objectives of event b) Establish concept, theme and format of event c) Prepare a concept plan 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Identify key objectives of event		
Clarify key objectives of event in consultation with customer/s and/or key stakeholders	❑	❑
Identify and analyse key information in consultation with customer/s and/or key stakeholders and other relevant parties	❑	❑
Identify and analyse factors which might impact on the event	❑	❑

Did the candidate	Yes	No
Element 2: Establish concept, theme and format of event		
Meet both customer needs and expectations in accordance with organisation standards, policies and procedures and within acceptable time frames	❑	❑
Develop an overall event concept, theme and format which reflects key objectives agreed upon with customer/s and/or key stakeholders	❑	❑
Verify practicality and viability of concept, theme and format through a sound process of consultation and analysis	❑	❑
Identify logistical requirements of overall concept, theme and format	❑	❑
Obtain relevant approval from customer/s and/or stakeholders prior to implementation	❑	❑
Element 3: Prepare a concept plan		
Document theme and operational context of the event or function	❑	❑
Document elements of the total concept agreed to by customer/s and/or stakeholders	❑	❑
Gain written agreement from customer/s and/or stakeholders	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor			
Strengths:			
Improvements needed:			
General comments:			
Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Design a concept for a major event or function D1.HCA.CL3.02		

The student is being assessed against industry competency standards and we are seeking your support in the judgement of their competence.

Please answer these questions as a record of their performance while working with you. Thank you for your time.

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 1: Identify key objectives of event			
Clarify key objectives of event in consultation with customer/s and/or key stakeholders	❑	❑	❑
Identify and analyse key information in consultation with customer/s and/or key stakeholders and other relevant parties	❑	❑	❑
Identify and analyse factors which might impact on the event	❑	❑	❑
Element 2: Establish concept, theme and format of event			
Meet both customer needs and expectations in accordance with organisation standards, policies and procedures and within acceptable time frames	❑	❑	❑
Develop an overall event concept, theme and format which reflects key objectives agreed upon with customer/s and/or key stakeholders	❑	❑	❑
Verify practicality and viability of concept, theme and format through a sound process of consultation and analysis	❑	❑	❑
Identify logistical requirements of overall concept, theme and format	❑	❑	❑
Obtain relevant approval from customer/s and/or stakeholders prior to implementation	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 3: Prepare a concept plan			
Document theme and operational context of the event or function	❑	❑	❑
Document elements of the total concept agreed to by customer/s and/or stakeholders	❑	❑	❑
Gain written agreement from customer/s and/or stakeholders	❑	❑	❑
Comments/feedback from Third Party to Trainer/Assessor:			
Third party signature:	**Date:**		
Send to:			

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Design a concept for a major event or function	D1.HCA.CL3.02
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Identify key objectives of event						
Clarify key objectives of event in consultation with customer/s and/or key stakeholders						
Identify and analyse key information in consultation with customer/s and/or key stakeholders and other relevant parties						
Identify and analyse factors which might impact on the event						
Element 2: Establish concept, theme and format of event						
Meet both customer needs and expectations in accordance with organisation standards, policies and procedures and within acceptable time frames						
Develop an overall event concept, theme and format which reflects key objectives agreed upon with customer/s and/or key stakeholders						
Verify practicality and viability of concept, theme and format through a sound process of consultation and analysis						
Identify logistical requirements of overall concept, theme and format						
Obtain relevant approval from customer/s and/or stakeholders prior to implementation						

Place a tick (✓) in the column to reflect evidence obtained to determine Competency of the student for each Performance Criteria.

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Prepare a concept plan						
Document theme and operational context of the event or function						
Document elements of the total concept agreed to by customer/s and/or stakeholders						
Gain written agreement from customer/s and/or stakeholders						
Candidate signature			**Date**			
Assessor signature			**Date**			

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