

## Competency Standards for Caribbean Vocational Qualifications (CVQ)

### CCBSEM3005 CVQ Level 3 –Event Management Services (Planning)

| Unit Code | Unit Title  | Mandatory/Elective |
|-----------|---|--------------------|
| BS00524   | Coordinate Human Resource                         | Mandatory          |
| BS00525   | Demonstrate Professionalism                       | Mandatory          |
| BS00526   | Develop Event Planning and Management Strategy    | Mandatory          |
| BS00527   | Develop Financial Resources for an Event          | Mandatory          |
| BS00528   | Develop Strategies to Host Media                  | Mandatory          |
| BS00529   | Develop Public Relations and Publicity Strategies | Mandatory          |
| BS00530   | Manage and Negotiate Contracts                    | Mandatory          |
| BS00531   | Manage Cash Handling                              | Mandatory          |
| BS00532   | Manage Marketing Materials                        | Mandatory          |
| BS00533   | Develop and Manage a Marketing Plan               | Mandatory          |
| BS00534   | Plan for Risk Management                          | Mandatory          |
| BS00535   | Prepare Quotations                                | Mandatory          |
| BS00536   | Promote an Event                                  | Mandatory          |
| BS00537   | Provide Motivation to Staff and Volunteers        | Mandatory          |
| BS00538   | Use Communication Skills                          | Mandatory          |
| BS00539   | Develop and Use Financial Management Skills       | Mandatory          |
| BS00540   | Use Management Skills to Plan an Event            | Elective           |
| BS00541   | Manage Event Merchandise                          | Elective           |

## BS00524: Coordinate Human Resource

## Unit Descriptor:

This unit deals with the skills and knowledge required to provide comprehensive personnel service in order to execute a successful event

| <b>ELEMENTS</b>             |  | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|--|-----------------------------|---|
| Candidates must be able to: |  |                             |   |
| 1                           | Establish a human resource plan                        | 1.1                         | Identify human resource needs and conduct task/function analysis for temporary, volunteer and permanent staff                       |
|                             |  | 1.2                         | Establish organisational and reporting structure, roles and responsibilities in accordance with workplace procedures                |
|                             |  | 1.3                         | Identify strategies to meet the needs of the staff  |
|                             |  | 1.4                         | Implement plan in accordance with workplace procedures  |
|                             |  | 1.5                         | Monitor and evaluate strategies   |
| 2                           | Implement policies and procedures for human management | 2.1                         | Establish policies and procedures for the event in accordance with workplace procedures   |
|                             |  | 2.2                         | Provide guidance for staff to comply and adhere to the relevant legislation, policies, and procedures                               |
|                             |  | 2.3                         | Establish a motivational environment to use rewards and incentives  |
| 3                           | Recruit staff and volunteers                           | 3.1                         | Create or review job description including job title, summary of duties, required responsibilities, wages and benefits              |
|                             |  | 3.2                         | Prepare event profile for applicants including organisational review, promotional materials, job descriptions and time expectations |
|                             |  | 3.3                         | Maintain human resource database in accordance with workplace procedures  |
|                             |  | 3.4                         | Review present staff and volunteers' qualification for new positions  |
|                             |  | 3.5                         | Ask for referrals from different sources for potential recruits   |

- |   |                            |  |
|---|----------------------------|--|
|   | 3.6                        | Advertise and review applications to ensure minimum qualifications are met in accordance with workplace procedures     |
|   | 3.7                        | Contact suitable applicants and arrange interviews   |
| 4 | Train staff and volunteers | 4.1 Brief staff and volunteers about the event's mission statement, structure, policies and procedures                 |
|   | 4.2                        | Conduct a tour of the workplace or event site  |
|   | 4.3                        | Introduce staff and volunteers to co-workers and supervisors   |
|   | 4.4                        | Review job descriptions and clarify roles, responsibilities and lines of authority in accordance with the event policy |
|   | 4.5                        | Provide documentation to staff and volunteer   |
|   | 4.6                        | Identify areas requiring training  |

## RANGE STATEMENT

### Needs include:

- recruit new personnel
- promote and train existing personnel
- ensuring strategies comply with legislation

### Areas requiring training include:

- knowledge of applicable legislation
- knowledge of the industry
- development and maintenance of files
- sales presentations
- cash controls and invoicing
- expense accounts
- protocol

### Documentation includes:

- volunteer handbook
- event briefing

### Different sources include:

- existing staff and volunteers
- educational institutions
- business associates, customers, dealers and suppliers
- private and government employment services
- referrals from other events planners

### Policies and procedures include:

- recruitment
- orientation and training
- supervision
- performance reviews
- discipline
- termination
- stress management
- roles and responsibilities
- accreditation
- event organisation chart

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. how to establish a Human Resource Plan
2. what are the relevant policies and procedures for the given event
3. how to establish and implement policies and procedures for a given event
4. how to maintain a human resource database
5. how to conduct a task/function analysis
6. what are the procedures for recruiting and training volunteers

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- conduct a task/function analysis
- maintain and establish a human resource data base
- train staff and volunteers

### (2) Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

### (3) Context of Assessment

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00525: Demonstrate Professionalism

## Unit Descriptor:

This unit deals with the skills and knowledge required for event professionals to demonstrate self-control, adherence to a high code of moral ethics and best practices of their profession

| ELEMENTS<br>Candidates must be able to: | PERFORMANCE CRITERIA  |
|---|---|
| 1 Demonstrate leadership                | 1.1 Share strong vision of the event with all team members/staff<br>1.2 Exhibit a positive attitude and use group facilitation skills and knowledge to demonstrate leadership<br>1.3 Respect personal limitations of others<br>1.4 Accept responsibility and use authority appropriately<br>1.5 Distinguish between assertive and aggressive behaviour and use in accordance with one's own job role<br>1.6 Delegate responsibly to team members/staff<br>1.7 Empower, motivate and inspire event team to perform at their best |
| 2 Manage multiple priorities            | 2.1 Focus on mission, goals and objectives of the event<br>2.2 Pay attention to details without losing sight of overall plan<br>2.3 Liaise with team members to clarify roles, responsibilities and to create a work plan<br>2.4 Break large tasks into smaller, manageable components or tasks and prioritize components/task<br>2.5 Determine when and to whom tasks should be delegated and delegate<br>2.6 Follow up on delegated tasks in accordance with event policies and procedures                                    |
| 3 Solve problems                        | 3.1 Identify problems and examine circumstances<br>3.2 Identify and evaluate options for solving problems<br>3.3 Select and follow through with best option within parameters of responsibility and in accordance with workplace procedures   |

- 3.4 Assess decision and record results when necessary in accordance with workplace procedures

## RANGE STATEMENT

Positive approach to problem solving include:

- accept problems as challenges
- demonstrate flexibility and creativity
- demonstrate confidence in own judgement
- remain cool and calm in any situation
- anticipate and plan for the unexpected

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what is the difference between assertive and aggressive behaviour
2. how to identify problems and evaluate problem solutions
3. what are the goals, objectives and mission of the event
4. what are the different facilitation skills and how to implement them
5. how to communicate effectively with internal and external customers
6. how to work in a team

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- use group facilitation skills and knowledge
- delegate and follow up on time bound delegated tasks
- manage multiple priorities
- solve problems

### (2) Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not

require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**(3) Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00526: Develop Event Planning and Management Strategy

Unit Descriptor:

This unit deals with the skills and knowledge required to ensure that consistency, efficiency, research and design planning of all events are completed

| <b>ELEMENTS</b>             |                                   | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|-----------------------------------|-----------------------------|--|
| Candidates must be able to: |                                   |                             |  |
| 1                           | Design and plan an event program  | 1.1                         | Research ideas for a new event program using brainstorming or networking techniques  |
|                             |                                   | 1.2                         | Research ideas for an established event using prior event's evaluation or comparable event history   |
|                             |                                   | 1.3                         | Perform needs assessment and risk analysis for the event and review the event's mission, goals and objectives  |
|                             |                                   | 1.4                         | Research target audience for new/established event   |
|                             |                                   | 1.5                         | Determine components for a new /established event  |
|                             |                                   | 1.6                         | Review business plan, event objectives, site requirements and evaluations of previous events and draft program in accordance with workplace procedures |
|                             |                                   | 1.7                         | Submit draft program and budgets for approval to the governing body/committee  |
|                             |                                   | 1.8                         | Obtain approval s and finalise program   |
|                             |                                   | 1.9                         | Develop required documents including an evaluation mechanism for the event and distribute to all relevant persons involved with the event              |
|                             |                                   | 1.10                        | Identify and pre determine green initiative to reduce event carbon footprint   |
| 2                           | Select site and develop site plan | 2.1                         | Identify the needs of the event  |
|                             |                                   | 2.2                         | Research and evaluate possible sites relevant to the event   |
|                             |                                   | 2.3                         | Determine best site and secure all necessary approvals in accordance with current legislation and workplace procedures                                 |
|                             |                                   | 2.4                         | Reserve and confirm site   |



- |   |   |   |
|---|---|---|
|   | 2.5   | Inspect site and draft site plan recognising environmental implications ,traffic flow, and appropriateness to event needs       |
|   | 2.6   | Determine appropriate entry and exit locations, considering safety, traffic flow and applicable legislation                     |
|   | 2.7   | Adjust site plan as required and submit to the governing body/committee for approval  |
| 3 | Contract entertainment activities and attractions |   |
|   | 3.1   | Identify the needs for the event  |
|   | 3.2   | Review budget and theme for the event   |
|   | 3.3   | Comply with union and music licensing regulations for the given event   |
|   | 3.4   | Identify potential suppliers for the event and explore opportunities for sharing cost   |
|   | 3.5   | Determine suitability of options considering market segment and time or day of performance                                      |
|   | 3.6   | Prioritize suitable options and confirm availability  |
|   | 3.7   | Acquire approval or consensus with governing body/committee   |
|   | 3.8   | Finalise booking and contract/s   |
| 4 | Develop food and beverage operations plan         |   |
|   | 4.1   | Identify needs for the planned event  |
|   | 4.2   | Identify considerations and develop guidelines for the event  |
|   | 4.3   | Confirm time, date and location of food and beverage services for the event   |
|   | 4.4   | Obtain all required food and beverage licences and permits for the event in accordance with current legislation and event needs |
| 5 | Develop event decor plan                          |   |
|   | 5.1   | Review theme, budget and objectives of the event  |
|   | 5.2   | Identify assets and limitations of site in relation to the theme, budget and objectives of the event                            |
|   | 5.3   | Design elements of the décor plan in accordance with the pre determined desired atmosphere for the event                        |
|   | 5.4   | Submit draft plan to the governing body/committee for approval where necessary  |

- 5.5 Communicate plan to appropriate parties
- 6 Develop system of accreditation/registration
  - 6.1 Identify the needs, requirements and criteria of access for the event
  - 6.2 Create a floor plan for the accreditation/registration area in accordance with event requirements
  - 6.3 Draft plan for accreditation including, criteria, levels, security and on site accreditation in accordance with event requirements
  - 6.4 Obtain approval for draft accreditation plan from the appropriate governing body/committee
  - 6.5 Determine potential methods of accreditation/registration in accordance with event requirements
  - 6.6 Consult with specialists for the planned event
  - 6.7 Circulate the plan to volunteers and staff
- 7 Develop a seating plan
  - 7.1 Identify seating needs considering the number of persons, type of seating and seating protocol
  - 7.2 Determine seating policy in accordance with admission priorities
  - 7.3 Prepare seating floor plans considering sightlines ,vision, regulated access to seating and compliance with legislation
  - 7.4 Submit seating floor plans to appropriate governing body/committee for approval
- 8 Develop logistics plan
  - 8.1 Identify security needs for the event in accordance with event requirements
  - 8.2 Identify transport needs for the event in accordance with event requirements
  - 8.3 Identify waste disposal and janitorial needs for the event in accordance with event requirements
  - 8.4 Prepare and submit draft logistics plan to relevant governing body/committee for approval

---

**RANGE STATEMENT**

## Research ideas include:

- brainstorming
- networking

## Event needs include:

- budget
- location
- availability
- support facilities
- demographics
- security requirements
- objectives of the event
- attractions
- entertainment

## Needs for the planned event include:

- meals provided
- concessions
- number of people with special diets

## Guidelines for the event include:

- acquiring products and services
- meeting training needs
- establishing controls
- method of distribution
- concession and site use

## Elements of decor plan include:

- event theme and images
- sponsor signage as required
- audio-visual or technical elements
- comply with legislation e.g. fire retardant materials

## Specialists for the planned event include:

- local police
- security company

## Requirements for special needs include:

- seating
- parking and parking stickers
- washrooms
- telecommunication devices for the hearing impaired
- ramps and wheel chair entrances
- transportation
- entertainment riders

## Accreditation/registration include:

## Required documents include:

- script if required
- detailed agenda
- production schedule

## Components for a new event include:

- site selection
- entertainment, activities and attractions
- food and beverage
- décor and design
- develop planning budgets

## Considerations for the event include:

- theme
- estimated consideration
- sponsors
- budget
- trends
- licensing requirements

## Components for an established event include:

- Reviews
- Previous business plan
- Site requirements
- Evaluations of previous events

## Potential suppliers include:

- performance and fine arts groups
- entertainment agents and suppliers
- local talent
- community groups

## Required legislation include:

- liquor licenses
- food badges

## Equipment and materials for the event include:

- admission booths
- tickets
- cash handling equipment
- accreditation materials –wristband, name tags
- programs, maps
- sign
- barricades
- secretariat
- press packages

## Admission priorities include :

- name tags
- photo identification
- wristbands
- reserved
- general
- medical/first aid personnel
- persons with disabilities
- sponsors
- complimentary

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what are the components of a program
2. how to conduct research
3. what are the various food and beverage regulations from region to region
4. how to determine the level of risk when planning decor
5. how to develop a seating plan
6. how to design and plan event program
7. how to a develop system of accreditation/registration
8. how develop a logistics plan
9. how develop a food and beverage operations plan
10. how to prepare a risk management plan
11. how to identify needs for a planned event

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- develop a seating plan
- design and plan event program
- develop system of accreditation/registration
- develop a logistics plan
- develop a food and beverage operations plan
- prepare a risk management plan
- identify needs for a planned event

### (2) Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**(3) Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00527: Develop Financial Resources for an Event

## Unit Descriptor:

This unit deals with the skill and knowledge required to develop financial resources for an event. This includes obtaining sponsorship and managing funding programs.

| <b>ELEMENTS</b>             |   | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|---|-----------------------------|--|
| Candidates must be able to: |   |                             |  |
| 1                           | Obtain sponsorship/revenue for an event | 1.1                         | Review event business plan and identify required sponsorship targets and levels  |
|                             |   | 1.2                         | Research and identify relevant sponsors/partners   |
|                             |   | 1.3                         | Analyse the probable costs and benefits to the event of involving each potential sponsor/partner   |
|                             |   | 1.4                         | Select the relevant sponsors/partners  |
|                             |   | 1.5                         | Develop and communicate a persuasive business case for sponsors/partners supporting the event  |
|                             |   | 1.6                         | Negotiate the commitment of sponsors/partners whose profile and goals are consistent with the aims and objectives of the event and whose needs outweigh the costs of their involvement |
|                             |   | 1.7                         | Obtain support of key stakeholders for proposed sponsorship/partnership arrangements   |
|                             |   | 1.8                         | Identify and agree on expectations with sponsors/partners  |
|                             |   | 1.9                         | Establish contractual agreements covering sponsorship/partnership in accordance with the event requirements  |
|                             |   | 1.10                        | Develop and maintain effective working relationship with sponsor/partner   |
|                             |   | 1.11                        | Obtain signature from both parties and ensure all negotiations and agreements are legal and ethical  |
| 2                           | Manage event sponsor process            | 2.1                         | Identify potential sponsors that are a good fit for the event  |
|                             |   | 2.2                         | Review financial targets for sponsor/s   |

- |   |                                |     |   |
|---|--------------------------------|-----|---|
| 3 | Manage program funding process | 2.3 | Examine the need for sponsor recognition and develop sponsor recognition program                          |
|   |                                | 2.4 | Co ordinate approach and timelines for soliciting sponsors in accordance with event timelines             |
|   |                                | 2.5 | Contact potential donors and outline how donations will be used   |
|   |                                | 2.6 | Implement sponsor recognition and branding program  |
|   |                                | 3.1 | Review budget and set goals in accordance with event requirements   |
|   |                                | 3.2 | Research potential funders in accordance with event requirements  |
|   |                                | 3.3 | Obtain and complete applications  |
|   |                                | 3.4 | Compile support materials in accordance with event requirements and organisational procedures             |
|   |                                | 3.5 | Submit applications and support materials to appropriate parties  |
|   |                                | 3.6 | Meet requirements of funding that has been awarded in accordance with any funding contractual obligations |

## RANGE STATEMENT

### Support materials include:

- letters of recommendations,
- budgets
- business plans
- financial statements

### Potential funders include:

- government
- foundations
- associations
- corporations
- public/private sectors
- individuals
- grants

### Requirements of funding include:

- final reports
- event feasibility report
- proper accounting procedures

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. how to identify the legal requirements covering sponsorships
2. how to identify sources of information on potential sponsors/partners for events
3. why it is important that the profile and goals of a sponsor/partner must be consistent with the aims and objectives of an event
4. how to identify sources of information and advice on sponsors/partnership contracts for events
5. what are the different sources of sponsorship/partnership that may occur in your sector
6. how to generate and recognise imaginative, cost effective and innovative solutions
7. how to seek out and act on new business opportunities
8. how to balance risks against the benefits that may arise from taking risks
9. how to deploy a range of legitimate strategies and tactics to influence people
10. how to compile support materials
11. how to conduct research and identify possible sponsors/partners
12. how to carry out a cost/benefit analysis of involving a sponsor/partner

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- generate and recognise imaginative, cost effective and innovative solutions
- seek out and act on new business opportunities
- balance risks against the benefits that may arise from taking risks
- deploy a range of legitimate strategies and tactics to influence people
- compile support materials
- research and identify possible sponsors/partners
- carry out a cost/benefit analysis of involving a sponsor/partner

### (2) Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The



candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**(3) Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00528: Develop Strategies to Host Media

## Unit Descriptor:

This unit deals with the skills and knowledge required to provide comprehensive and accurate information to the media in order to create time specific focus on an event, its launch and activities.

| <b>ELEMENTS</b>             |                                  | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|----------------------------------|-----------------------------|--|
| Candidates must be able to: |                                  |                             |  |
| 1                           | Prepare media plan               | 1.1                         | Develop and maintain a media resource database in accordance with event requirements and organisational procedures |
|                             |                                  | 1.2                         | Determine best methods for communicating messages  |
|                             |                                  | 1.3                         | Identify the best implementation schedule for the media plan   |
| 2                           | Develop media relations          | 2.1                         | Accommodate and respect media needs and restrictions   |
|                             |                                  | 2.2                         | Provide media with appropriate access and facilities   |
|                             |                                  | 2.3                         | Provide accurate and credible event information to the media   |
| 3                           | Prepare and issue media releases | 3.1                         | Review media relations policies  |
|                             |                                  | 3.2                         | Prepare timely and newsworthy media releases in accordance with the relevant media protocol                        |
|                             |                                  | 3.3                         | Determine details of the who, what, when, where and why for the event  |
|                             |                                  | 3.4                         | Check accuracy of details by reviewing records and confirming sources  |
|                             |                                  | 3.5                         | Proof copy and distribute to appropriate media outlets in accordance with the relevant media protocol              |
|                             |                                  | 3.6                         | Follow up where necessary/as required  |
| 4                           | Prepare media packages           | 4.1                         | Compile background information on event  |
|                             |                                  | 4.2                         | Place relevant media material in media packages and distribute in accordance with event/organisational procedures  |
| 5                           | Co ordinate media conference     | 5.1                         | Set time and date ensuring that information is newsworthy and media is available to meet                           |

- 5.2 Book venue considering location and cost
  - 5.3 Invite media and outline purpose, place, date and time
  - 5.4 Make arrangements and ensure all the pre requisites are in place
  - 5.5 Arrange for onsite tours for media where applicable
  - 5.6 Provide opportunities for post conference interviews in accordance with organisational procedures
  - 5.7 Distribute media packages to media personnel not in attendance
- 6 Arrange media blitz
- 6.1 Determine the purpose of the media blitz and select event spokesperson
  - 6.2 Target appropriate media considering market, personality and / or spokesperson and how attention will be sought
  - 6.3 Schedule interviews and select discussion topics in accordance with the planned event
  - 6.4 Provide background information to media about the event
  - 6.5 Provide speaking notes to spokesperson
  - 6.6 Confirm interviews and arrange transportation
  - 6.7 Conduct or delegate media blitz as required in accordance with the planned event

## **RANGE STATEMENT**

Media resource database includes:

- up to date list of contacts
- record deadlines for submitting media releases
- copies of media releases
- format required by each individual media outlet

Media protocol includes:

- short words
- short sentences and paragraphs
- Information summarised in lead paragraph
- Providing additional information in order of importance
- Obtaining statements from appropriate individuals
- Providing contact information

Background information includes:

- history
- key biographies
- photographs
- statistics

Pre requisites include:

- room set up (video, photo or private room for interviews)
- food and beverage
- volunteers
- security
- entertainment and background music
- media accreditation – name tags

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. how to develop and maintain a media resource database
2. what are the different methods of communication
3. how to prepare media releases
4. how to prepare and issue media releases
5. how to prepare a media plan
6. how to maintain a RSVP system

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- prepare media packages
- prepare and issue media releases
- prepare a media plan
- follow up and maintain a RSVP system

### (2) Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The

candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**(3) Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00529: Develop Public Relations and Publicity Strategies

## Unit Descriptor:

This unit deals with the skills and knowledge required to maintain consistent delivery of messages, to create awareness and provide comprehensive and accurate overview of an event.

| <b>ELEMENTS</b>             |                          | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|--------------------------|-----------------------------|---|
| Candidates must be able to: |                          |                             |   |
| 1                           | Develop public relations | 1.1                         | Review event goals and objectives and define the role of maintaining positive image and event management                        |
|                             |                          | 1.2                         | Research attitudes towards and perceptions of events from different sources   |
|                             |                          | 1.3                         | Identify information needs of each sector of the public   |
|                             |                          | 1.4                         | Develop proactive and reactive strategies to address event and organisations' needs and objectives                              |
|                             |                          | 1.5                         | Develop well articulated and credible messages to be communicated to the different sectors of the public                        |
| 2                           | Develop publicity plan   | 2.1                         | Identify legal, regulatory and ethical requirements affecting implementation of public relations strategies                     |
|                             |                          | 2.2                         | Define public relations objectives for event  |
|                             |                          | 2.3                         | Source and select suitable media and communication outlets to reach sectors of the public in accordance with event requirements |
|                             |                          | 2.4                         | Determine resource requirements for the event   |
|                             |                          | 2.5                         | Develop schedule of publicity campaign activities in accordance with the planned event  |
|                             |                          | 2.6                         | Develop media list with contact information and protocols   |
| 3                           | Implement publicity plan | 3.1                         | Establish relationships with relevant the stakeholders  |
|                             |                          | 3.2                         | Identify issues and trends that may impact event objectives and/or production   |
|                             |                          | 3.3                         | Assign event spokesperson based on the organisation chart for the event and in accordance with organisational procedures        |

- |   |                                 |   |
|---|---------------------------------|---|
|   | 3.4                             | Cultivate a positive image and public opinion through promotional activities, advertising campaigns and a publicity plan    |
|   | 3.5                             | Evaluate effectiveness of public relations activities and adjust plan and activities to address any issues                  |
| 4 | Develop advertising strategy    | 4.1 Review marketing plan   |
|   | 4.2                             | Identify purpose of advertising message in relation to the planned event  |
|   | 4.3                             | Identify advertising opportunities and develop advertising campaign   |
|   | 4.4                             | Evaluate effectiveness of advertising and identify advertising media where necessary  |
| 5 | Manage crises and controversies | 5.1 Monitor news related to the event and stakeholder environments and respond appropriately to manage damage control       |
|   | 5.2                             | Recognise any potential crisis/ incidents that may escalate   |
|   | 5.3                             | Follow crisis communication protocols and gather facts to verify or dispute claims  |
|   | 5.4                             | Maintain consistent, agreed upon messages in keeping with mission statement, goals and objectives of event and organisation |
|   | 5.5                             | Document findings in accordance with organisational procedures  |

## RANGE STATEMENT

Resource requirements include:

- print materials
- digital materials
- crisis management manual

Different sources include:

- attendees
- communities,
- government
- media
- individuals

Purpose of advertising include:

Campaign activities include:

- media blitz
- media announcements
- social media management

Plan activities include:

- develop key messaging
- develop media plan
- organise speaking engagements
- comply with protocol
- identify spokespeople

Advertising opportunities include:

- to get attention
- develop interest
- create desire
- promote action
- to inform
- direct agreement
- contract directly with media outlets
- exchange of product for product
- exchange with advertising media

Relevant stakeholder include:

- government
- communities
- media personnel

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

- 1 what are the media and communication outlets, contacts and protocols
- 2 what are the key internal and external issues affecting an event and/or organisation
- 3 how to develop a public relations and publicity plan
- 4 how to treat with crisis communications
- 5 how to evaluate and monitor effectiveness of public relations campaigns
- 6 how to develop well articulated and credible messages to be communicated to different sectors of the public
- 7 how to follow communication protocols and gather facts to verify or dispute claims
- 8 how to recognise potential of incidents to escalate
- 9 how to identify advertising opportunities and develop advertising campaign
- 10 how to leverage opportunities to extract positive publicity and image management

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- develop well articulated and credible messages to be communicated to sectors of the public
- follow communication protocols and gather facts to verify or dispute claims



- recognise potential of incidents to escalate
- identify advertising opportunities and develop advertising campaign
- leverage opportunities to extract positive publicity and image management

**(2) Method of Assessment**

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**(3) Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00530: Manage and Negotiate Contracts

## Unit Descriptor:

This unit deals with the skills and knowledge required to apply contracts to specific services needed for event requirements.

| <b>ELEMENTS</b>             |                     | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|---------------------|-----------------------------|--|
| Candidates must be able to: |                     |                             |  |
| 1                           | Develop contract    | 1.1                         | Outline and develop the scope of works for the event   |
|                             |                     | 1.2                         | Develop and draft contract in accordance with event requirements   |
|                             |                     | 1.3                         | Submit draft contract to senior personnel/committee for approval   |
|                             |                     | 1.4                         | Prepare approved contract in accordance with workplace, event and legal requirements   |
| 2                           | Source suppliers    | 2.1                         | Review business plan for the event and list what is required from suppliers  |
|                             |                     | 2.2                         | Clarify specifications with senior personnel/event committee and ensure they are clear and realistic                             |
|                             |                     | 2.3                         | Develop and agree on selection criteria for suppliers in accordance with event requirements                                      |
|                             |                     | 2.4                         | Obtain tenders from a range of suppliers   |
|                             |                     | 2.5                         | Evaluate tenders in accordance with established criteria and present shortlist for selection to senior personnel/event committee |
| 3                           | Negotiate contracts | 3.1                         | Identify the type of contract and review the terms and conditions of the contract  |
|                             |                     | 3.2                         | Clarify terms and conditions of the contract with senior personnel/event committee and establish signing authority               |
|                             |                     | 3.3                         | Consult legal counsel where necessary  |
|                             |                     | 3.4                         | Document and store all contracts following organisation's /event procedures  |

**RANGE STATEMENT**

Method of sourcing includes:

- request for proposal
- sole source
- tender
- public bid
- invitation

Type of contract includes:

- lease
- service
- sales

Terms and conditions of the contract include:

- guarantees and deposit
- cancellation and attrition policies
- responsibilities for liability insurance and disclaimers

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what are the key terms of a contract and the implications to an event
2. what are the key sections of a contract
3. how to develop a selection criteria for suppliers
4. how to develop a supplier contract
5. how to apply key terms of a contract in negotiation
6. how to source and negotiate with suppliers

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- develop a contract
- apply key terms of a contract in negotiation
- source and negotiate with suppliers
- develop well articulated and credible messages to be communicated to sectors of the public
- follow communication protocols and gather facts to verify or dispute claims
- recognise potential of incidents to escalate
- identify advertising opportunities and develop advertising campaign
- leverage opportunities to extract positive publicity and image management

### 2. Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The

candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00531: Manage Cash Handling

### Unit Descriptor:

This unit deals with the skills and knowledge required to establish, manage and monitor cash handling procedures for any given event

| <b>ELEMENTS</b>             |                                    | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|------------------------------------|-----------------------------|---|
| Candidates must be able to: |                                    |                             |   |
| 1                           | Establish cash handling procedures | 1.1                         | Communicate policies and procedures to staff and volunteers   |
|                             |                                    | 1.2                         | Coordinate money handling and take steps to prevent theft   |
|                             |                                    | 1.3                         | Set up cash collection, deposit systems and a central cash office in accordance with event requirements and organisational procedures |
|                             |                                    | 1.4                         | Arrange for security and audit systems in accordance with event requirements  |
| 2                           | Monitor cash handling procedures   | 2.1                         | Review security procedures and identify any potential problems  |
|                             |                                    | 2.2                         | Monitor cash handling procedures and audit documentation in accordance with event/organisational procedures                           |
|                             |                                    | 2.3                         | Revise procedures as needed   |

### RANGE STATEMENT

Policies and procedures include:

- auditing receipt book ( cash pan or bank statements)
- account reconciliation (income and expenditure statements)

### UNDERPINNING KNOWLEDGE & SKILLS

**Candidates must know:**

1. what are the financial policies and procedures governing an event
2. what are the security measures in place for the event
3. how to establish money and monitor handling procedures
4. how to monitor cash handling procedures and audit documentation in accordance with event/organisational procedures

**EVIDENCE GUIDE****1 Critical Aspects of Evidence**

Evidence should include a demonstrated ability to:

- monitor cash handling procedures and audit documentation in accordance with event/organisational procedures
- establish money and monitor handling procedures

**2 Method of Assessment**

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**3 Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00532: Manage Marketing Materials

## Unit Descriptor:

This unit deals with the skills and knowledge required to develop a system whereby marketing materials for any given event can be managed

| <b>ELEMENTS</b>             |  | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|--|-----------------------------|---|
| Candidates must be able to: |  |                             |   |
| 1                           | Determine marketing materials required for the event | 1.1                         | Determine type of marketing materials needed for marketing and event activities   |
|                             |  | 1.2                         | Determine material specifications   |
|                             |  | 1.3                         | Determine implementation schedule in accordance with the planned event  |
|                             |  | 1.4                         | Identify the relevant available media to meet requirements for print /electronic  |
|                             |  | 1.5                         | Identify marketing message for each target market segment in accordance with the event requirements   |
|                             |  | 1.6                         | Select suitable and cost effective medium for each type of event material to be produced in accordance with the event's budget and requirements |
| 2                           | Develop content and design parameters                | 2.1                         | Determine style of materials required for the content and design of the marketing materials   |
|                             |  | 2.2                         | Use appropriate language and formats to incorporate branding message and prepare content of text  |
|                             |  | 2.3                         | Prepare layout for printing and production and obtain the necessary approvals   |
|                             |  | 2.4                         | Monitor consistency of event theme/concept, branding and message  |
|                             |  | 2.5                         | Obtain permission to use copyrighted materials where necessary in accordance with current legislation and event /organisational procedures      |
|                             |  | 2.6                         | Copyright materials where necessary in accordance with current legislation and event/organisational policies                                    |
| 3                           | Produce marketing materials                          | 3.1                         | Define specifications for each item   |
|                             |  | 3.2                         | Determine delivery deadline/s for marketing material in accordance with the planned event timelines   |

- |   |                                |  |
|---|--------------------------------|--|
|   | 3.3                            | Source and solicit suitable providers to obtain marketing materials                                      |
|   | 3.4                            | Monitor quality and accuracy of text and match to specifications   |
| 4 | Distribute marketing materials | 4.1 Identify delivery method for each item produced in accordance with the event's budget                |
|   | 4.2                            | Develop distribution schedule in accordance with the planned event timelines                             |
|   | 4.3                            | Organise and assemble materials for distribution   |
|   | 4.4                            | Archive printed/imprinted materials in accordance with event /organisation's management information plan |

## RANGE STATEMENT

Marketing materials include:

- printed/digital
- programs
- brochures
- tickets
- flyers and posters
- coupons
- invitations
- feedback forms
- registration forms

Material specifications include:

- quality
- colour
- quantity
- size and format
- logo placement

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:



1. what type and style of marketing materials are needed for an assigned event
2. how to produce print or output marketing materials
3. how to design and develop content for an event
4. how to copyright marketing materials
5. how to align marketing messages with target markets

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- source and solicit suitable providers
- monitor quality and accuracy of text and match to specifications
- identify marketing message for each target market segment
- produce marketing materials to event specifications
- prepare requests for proposal to secure bids for production and output of marketing materials
- produce and distribute marketing materials

### 2. Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

### 3. Context of Assessment

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00533: Develop and Manage a Marketing Plan

## Unit Descriptor:

This unit deals with the skills and knowledge required to develop and manage an event marketing plan.

| <b>ELEMENTS</b>             |                                | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|--------------------------------|-----------------------------|---|
| Candidates must be able to: |                                |                             |   |
| 1                           | Conduct situational analysis   | 1.1                         | Review historical data and evaluate event features  |
|                             |                                | 1.2                         | Identify strengths, weakness, opportunities and threats to event and/or organisation  |
|                             |                                | 1.3                         | Assess target market/s in accordance to event's goals and objectives  |
|                             |                                | 1.4                         | Evaluate competition's strengths and weakness in accordance with event's goals and objectives                                   |
|                             |                                | 1.5                         | Evaluate community infrastructure and resources in accordance with event requirements   |
|                             |                                | 1.6                         | Identify new marketing techniques and media available for the planned event in accordance with the event's goals and objectives |
|                             |                                | 1.7                         | Summarise results of situational analysis   |
| 2                           | Define target market segments  | 2.1                         | Develop profiles of potential event attendees   |
|                             |                                | 2.2                         | Match target segment profile to event features ,products and services   |
|                             |                                | 2.3                         | Define geographic reach of the event  |
| 3                           | Develop branding for the event | 3.1                         | Identify unique value for target market   |
|                             |                                | 3.2                         | Position the planned event amidst other events  |
|                             |                                | 3.3                         | Identify marketing message for each target market identified  |
|                             |                                | 3.4                         | Develop logo, visual and verbal identifiers and engage expertise if required  |
|                             |                                | 3.5                         | Provide consistency with brand, goals and objectives of the event   |
| 4                           | Select marketing medium        | 4.1                         | Assess available medium/media for optimum market awareness  |

- 4.2 Match messages to target market/s using the best medium/media
- 4.3 Select the most effective medium/media in accordance with event policies
- 5 Develop integrated marketing strategy
  - 5.1 Design event marketing strategy that will complement or integrate with organisations/event marketing strategy
  - 5.2 Develop schedule of marketing activities to build up to and/or during the event
  - 5.3 Maintain consistency of marketing activities for the event
  - 5.4 Determine budget allocations, staff responsibilities and milestones in conjunction with the event critical path
  - 5.5 Identify resource requirements to implement plan and forecast demand based on situational analysis
  - 5.6 Determine marketing goals and objectives for the event products and services
  - 5.7 Prioritize event market segments in relation to products and services
  - 5.8 Determine required information collection and record keeping
- 6 Implement marketing plan
  - 6.1 Communicate goals, objectives and changes made to the plan to the marketing staff in accordance with event/organisation procedures
  - 6.2 Delegate responsibilities where necessary
  - 6.3 Determine critical dates and coordinate activities with other aspects of the event production
  - 6.4 Monitor activities and results on ongoing basis
  - 6.5 Ensure goals and objectives are met in a timely manner
  - 6.6 Maintain record of activities in accordance with event/organisation procedures
  - 6.7 Adjust marketing plan in response to variations in performance, budget, target market behaviour and market conditions
  - 6.8 Re allocate staff and resources where necessary and communicate changes to stakeholders

- 6.9 Prepare evaluation of marketing activities and submit to senior personnel/committee in accordance with event/organisation procedures

## RANGE STATEMENT

Historical data includes:

- surveys
- evaluations
- budget
- comparable events

Profiles include:

- age
- gender
- lifecycle stage
- socio economic – income, type of work

Method of activities include:

- costs
- results
- influencing factors

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what are the different segments of a marketing plan
2. what are the different sources of market information current and historical
3. how to collect and analyse data
4. how to analyse a target market
5. what are the available marketing mediums/media
6. what are some stakeholder needs, wants and expectations relevant to the event
7. what are the strengths and weakness of different types of media
8. how to transform threats into opportunities

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- perform situational /target market analysis
- assess available medium/media for market penetration
- match messages to target markets using the best medium/media
- communicate effectively goals and objectives of the marketing plan to staff
- delegate responsibilities
- coordinate activities and results on an ongoing basis
- evaluate effectiveness of the marketing plan

## **2. Method of Assessment**

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

## **3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00534: Plan for Risk Management

## Unit Descriptor:

This unit deals with the skills and knowledge required to apply risk considerations to the executions of an event. It also includes identification, planning and evaluation of an event for potential risks.

| <b>ELEMENTS</b>             |                                    | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|------------------------------------|-----------------------------|---|
| Candidates must be able to: |                                    |                             |   |
| 1                           | Develop event risk management plan | 1.1                         | Identify and establish event risk management policies with the appropriate parties/committees   |
|                             |                                    | 1.2                         | Perform risk analysis to determine potential risk/s for the event   |
|                             |                                    | 1.3                         | Prepare risk management plan including chain of command to communicate incidents and to assist in budget development in accordance with identified risk and event/organisation procedures |
|                             |                                    | 1.4                         | Communicate plan to the appropriate persons/committee and implement   |
|                             |                                    | 1.5                         | Train appropriate individuals on safety,risk issues and procedures in accordance with event/organisation procedures   |
| 2                           | Comply with legislation            | 2.1                         | Identify legislation that applies to the event and discuss with event manager and or client   |
|                             |                                    | 2.2                         | Clarify impacts of legislation on event activities and apply legislation to the event   |
|                             |                                    | 2.3                         | Adhere to and ensure enforcement of legislation by all parties involved with the event  |
|                             |                                    | 2.4                         | Keep current with changes to legislation and comply when necessary  |
| 3                           | Develop contingency plan           | 3.1                         | Identify circumstances that may require contingency plans in accordance with the event execution  |
|                             |                                    | 3.2                         | Research alternatives in accordance with the scope of the event   |
|                             |                                    | 3.3                         | Outline implementation strategies, determine decision making authority and consider implications  |

- 3.4 Develop internal and external communication strategies for the event in accordance with event/organisation policies

## RANGE STATEMENT

Circumstances include:

- cancellations
- labour disputes
- funding shortfalls
- weather
- competing events
- infrastructural issues

Implications include:

- insurance
- contracts
- politics
- communication
- timing
- engineering competencies

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. how to identify the different types of risk that can occur in an event
2. how to prepare a risk management plan for an event
1. how to perform a risk evaluation for an event
2. how to develop a contingency plan

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- develop a risk management plan for an event
- identify the different types of risk associate with executing an event
- how to perform a risk evaluation for an event
- how to develop a contingency plan

### 2. Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams



BS00535: Prepare Quotations

Unit Descriptor:

This unit deals with the skills and knowledge required to calculate the cost of products and services and to present quotations to customers. It requires the ability to provide quotations for products and services where some costing and pricing has already been undertaken in the product development stage

| <b>ELEMENTS</b>             |   | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|---|-----------------------------|--|
| Candidates must be able to: |   |                             |  |
| 1                           | Calculate the cost of products and services | 1.1                         | Create records to administer customer details and requirements   |
|                             |   | 1.2                         | Source, select and interpret product and costing information to prepare quotation  |
|                             |   | 1.3                         | Negotiate cost with suppliers in accordance with commercial agreements and within scope of one's own individual responsibility                               |
|                             |   | 1.4                         | Calculate commissions, mark up and net costs to determine a profitable selling price in accordance with the organisation/event's procedures and requirements |
|                             |   | 1.5                         | Calculate any additional taxes, special fees and other charges   |
|                             |   | 1.6                         | Calculate any required currency conversion   |
|                             |   | 1.7                         | Check all calculations against all products and services components and calculate the final cost to the customer   |
|                             |   | 1.8                         | Maintain detailed records of all methods of calculation in accordance with organisation/event's procedures   |
| 2                           | Provide quotations to customers             | 2.1                         | Prepare quotations to reflect all inclusions required by the customer  |
|                             |   | 2.2                         | Provide quotation to the customer in accordance with organisation procedures   |
|                             |   | 2.3                         | Offer secondary quotations with options, if necessary  |
|                             |   | 2.4                         | File all quotation details in accordance with workplace procedures   |
|                             |   | 2.5                         | Maximise electronic transmission and filing of all documents to reduce waste and negative environmental impacts  |

- |   |                             |     |   |
|---|-----------------------------|-----|---|
| 3 | Update and amend quotations | 3.1 | Adjust and update quotations where necessary  |
|   |                             | 3.2 | Provide quotation to the customer in accordance with organisation procedures and formats                  |
|   |                             | 3.3 | Provide secondary quotations with options if necessary  |
|   |                             | 3.4 | Include details of the cost of products and services, and the conditions and limitations of the quotation |
|   |                             | 3.5 | Record all details of the quotation and keep on file in accordance with organisation procedures           |

## RANGE STATEMENT

Quotations include:

- single product or service
- multiple products and services making up a complete itinerary
- meeting conferences

Special fees include:

- service fee
- transaction fee
- cancellation fee
- reconfirmation fee

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what are the key principles and elements of calculating costs and components of quotations
2. what products are specific to the industry/ sector and knowledge about the products included in the quotation
3. how to negotiate cost of supply, contractual arrangements and preferred supplier arrangements
4. what are the industry's commission and mark up procedures appropriate to the specific industry sector
5. how to provide quotations to customers

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- prepare and provide multiple quotations in response to multiple customer requests covering a range of products and services
- apply knowledge of the industry practices in relation to commission, mark up and fees
- complete quotations within typical workplace time constraints and the deadlines determined by the customer and organisation
- provide quotations to customers

**2. Method of Assessment**

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00536: Promote an Event

### Unit Descriptor:

This unit deals with the skills and knowledge required to design an event to catch the interest of the potential clients.

| <b>ELEMENTS</b><br>Candidates must be able to: |                                      | <b>PERFORMANCE CRITERIA</b> |   |
|--|--------------------------------------|-----------------------------|---|
| 1  | Develop an advertising plan          | 1.1                         | Determine advertising needs of the event  |
|  |                                      | 1.2                         | Evaluate strengths and weakness of available media outlets and techniques   |
|  |                                      | 1.3                         | Identify suitable media outlets   |
|  |                                      | 1.4                         | Negotiate and purchase media goods and services   |
| 2  | Develop promotional events           | 2.1                         | Evaluate pros and cons promotional activities that will create awareness and interest for the event                         |
|  |                                      | 2.2                         | Determine pros and cons of different promotional activities   |
|  |                                      | 2.3                         | Determine liabilities and legalities of promotional activities  |
|  |                                      | 2.4                         | Determine timelines ,resource requirements and staff responsibilities for different activities                              |
|  |                                      | 2.5                         | Maximise media coverage of promotional events   |
| 3  | Develop cross promotional activities | 3.1                         | Assess potential partnership opportunities with sponsors, donors ,suppliers, and other compatible organisations             |
|  |                                      | 3.2                         | Assess opportunities and costs to promote event at venues of other non competing events with similar target market segments |
|  |                                      | 3.3                         | Select a mix of activities for promotions   |
|  |                                      | 3.4                         | Negotiate reciprocal agreements for logo and brand usage  |
|  |                                      | 3.5                         | Determine resource requirements   |
|  |                                      | 3.6                         | Liaise with partners and co ordinate launch dates of each promotional activity  |
| 4  | Develop contest                      | 4.1                         | Determine type of contest to hold   |
|  |                                      | 4.2                         | Assess liabilities and legalities   |

- |   |                              |   |
|---|------------------------------|---|
|   | 4.3                          | Develop rules, regulations, selection criteria and entry procedures and define prize system |
|   | 4.4                          | Obtain cross promotional opportunities with sponsors and suppliers                          |
|   | 4.5                          | Determine resource requirements   |
|   | 4.6                          | Co ordinate presentation logistics  |
| 5 | Co ordinate sales promotions |   |
|   | 5.1                          | Determine requirements for each promotional activity  |
|   | 5.2                          | Assess each activity on its ability to create demand  |
|   | 5.3                          | Determine strategies to stimulate purchasing urgency  |
|   | 5.4                          | Develop schedule of promotional activities to build up to the event                         |
|   | 5.5                          | Integrate activities to build on and reinforce each other                                   |
|   | 5.6                          | Maintain consistency of promotional activities  |

## RANGE STATEMENT

Mix of activities include:

- multi tiered
- cross promotions

Resource requirements include:

- print materials and merchandise

Contest include:

- draw
- game
- skill testing

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what is an evaluation plan and its processes
2. how to develop an advertising plan
3. how to select marketing media for relevant promotions
4. how to perform cross promotional activities
5. how to develop promotional events
6. how to develop contest
7. how to co ordinate sales promotions

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- co ordinate a promotional plan
- integrate activities to build on and reinforce each other
- develop an advertising plan
- select marketing media for relevant promotions
- perform cross promotional activities
- develop promotional events
- develop contest
- co ordinate sales promotions

### 2. Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

### 3. Context of Assessment

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00537: Provide Motivation to Staff and Volunteers

## Unit Descriptor:

This unit deals with the skill and knowledge required to provide motivation to staff and volunteers to ensure an efficient and effective execution of an event.

| <b>ELEMENTS</b>             |                                | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|--------------------------------|-----------------------------|---|
| Candidates must be able to: |                                |                             |   |
| 1                           | Supervise staff and volunteers | 1.1                         | Promote teamwork and resolve conflicts  |
|                             |                                | 1.2                         | Motivate staff and volunteers   |
|                             |                                | 1.3                         | Conduct staff performance reviews and volunteer evaluations   |
|                             |                                | 1.4                         | Discipline staff and volunteers and respond to disciplinary situations immediately                            |
| 2                           | Promote teamwork               | 2.1                         | Develop teamwork philosophy in accordance with workplace/event requirements                                   |
|                             |                                | 2.2                         | Implement teamwork philosophy   |
| 3                           | Motivate staff and volunteers  | 3.1                         | Identify individual motivational needs of staff and volunteers  |
|                             |                                | 3.2                         | Accommodate individual needs and recognise efforts  |
| 4                           | Resolve conflict               | 4.1                         | Identify nature of conflict and responsibility for resolution   |
|                             |                                | 4.2                         | Apply conflict resolution techniques in accordance with the policies and procedures of the organisation/event |
|                             |                                | 4.3                         | Obtain agreement for resolution and establish timelines   |
|                             |                                | 4.4                         | Record details and perform follow ups   |
| 5                           | Conduct performance reviews    | 5.1                         | Prepare and hold performance review   |
|                             |                                | 5.2                         | Record results in accordance with workplace/event procedures  |

**RANGE STATEMENT**

**Teamwork philosophy include:**

- success requires combined effort toward common goal
- all staff and volunteers, regardless of role, contribute to success
- working as a member of a team is personally rewarding
- teamwork produces consistent products and services

**Individual needs include:**

- additional guidance and training
- staff performance reviews and volunteer evaluations as opportunities for feedback
- positive reinforcement
- rewards and incentives when appropriate

**Conflict resolution techniques include:**

- handling situation in private
- focus on behaviours rather than on personalities
- suggest possible solutions
- be open minded
- mediation

**Recognise efforts include:**

- letters to staff and volunteers
- wind up party
- gifts/ certificates of achievement
- recommendation for future events

## UNDERPINNING KNOWLEDGE & SKILLS

**Candidates must know:**

1. how to develop and implement teamwork philosophy
2. what are the steps in conflict resolution
3. what are the policies and procedures of the organisation/event
4. what are the different conflict resolution techniques
5. how to conduct performance reviews
6. how to resolve conflict
7. how to motivate staff and volunteers
8. how to promote teamwork

## EVIDENCE GUIDE

**1. Critical Aspects of Evidence**

Evidence should include a demonstrated ability to:

- promote teamwork and resolve conflicts



- conduct staff performance reviews and volunteer evaluations
- record details and perform follow ups
- supervise staff and volunteers
- resolve conflict
- develop and implement teamwork philosophy

## **2. Method of Assessment**

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

## **3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00538: Use Communication Skills

## Unit Descriptor:

This unit deals with the skills and knowledge required to ensure that messages are properly understood and acted upon by all parties involved to ensure the success of an event

| <b>ELEMENTS</b>             |                              | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|------------------------------|-----------------------------|--|
| Candidates must be able to: |                              |                             |  |
| 1                           | Speak effectively            | 1.1                         | Use verbal, par verbal and non verbal messages to re enforce one another |
|                             |                              | 1.2                         | Use active listening skills  |
| 2                           | Develop effective messages   | 2.1                         | Introduce and conclude messages appropriately                            |
|                             |                              | 2.2                         | Consider purpose of message and its desired impact and priorities        |
|                             |                              | 2.3                         | Keep messages short and to the point                                     |
|                             |                              | 2.4                         | Summarise details  |
|                             |                              | 2.5                         | Allow the receiver to provide feedback                                   |
|                             |                              | 2.6                         | Observe protocol using appropriate titles or names                       |
| 3                           | Communicate in writing       | 3.1                         | Research and develop clear messages where necessary                      |
|                             |                              | 3.2                         | Identify key points and simply messages if possible                      |
|                             |                              | 3.3                         | Assemble in logical order  |
|                             |                              | 3.4                         | Use language appropriate to audience                                     |
|                             |                              | 3.5                         | Select presentation format, edit and proof read material                 |
| 4                           | Make effective presentations | 4.1                         | Determine prospective audience background and motivation for attending   |
|                             |                              | 4.2                         | Research topic and organise material logically                           |
|                             |                              | 4.3                         | Use language appropriate to audience and be accurate                     |
|                             |                              | 4.4                         | Use presentation aids  |
|                             |                              | 4.5                         | Prepare support materials if necessary                                   |

- 4.6 Make necessary arrangements suitable to presentations and audience
- 4.7 Arrive early to set up and check room
- 4.8 Interact with audience and make eye contact
- 4.9 Keep presentation within time limit and on topic

## RANGE STATEMENT

Active listening skills include:

- being open minded
- displaying interest and enthusiasm using eye contact and smiling
- observing non verbal communication
- paraphrasing to confirm understanding
- asking questions

Presentation aids include:

- audio
- visual
- print

Support materials include:

- brochures
- pamphlets
- registration forms
- videos

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what are the different communication techniques
2. how to research and develop clear messages
3. how to prepare effective presentations

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- speak effectively when making presentations
- use presentation aids and deliver presentations
- develop effective messages

### 2. Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct

observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

### **3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00539: Develop and Use Financial Management Skills

## Unit Descriptor:

This unit deals with the skills and knowledge required to develop and use financial management tools and processes to ensure accountability for any given event

| <b>ELEMENTS</b><br>Candidates must be able to: |   | <b>PERFORMANCE CRITERIA</b> |   |
|--|---|-----------------------------|---|
| 1  | Develop budgets                             | 1.1                         | Determine the financial goals of event  |
|  |   | 1.2                         | Review previous budgets and audits  |
|  |   | 1.3                         | Determine potential sources of revenue  |
|  |   | 1.4                         | Determine expenses  |
|  |   | 1.5                         | Develop charts of accounts, revenues and expenses   |
|  |   | 1.6                         | Perform cost benefit analysis   |
|  |   | 1.7                         | Determine cost control measures for committee spending limitations  |
|  |   | 1.8                         | Prepare budgets including breakdown of revenues and expenses  |
|  |   | 1.9                         | Identify cash flow projections  |
|  |   | 1.10                        | Determine fixed and variable costs, break even and profit positions   |
|  |   | 1.11                        | Obtain approval or consensus from committee or relevant persons   |
| 2  | Establish financial controls and procedures | 2.1                         | Schedule regular reviews of budget and analyse variances  |
|  |   | 2.2                         | Determine credit arrangements needed with regards to suppliers and establish financial systems and controls |
|  |   | 2.3                         | Determine authorised signatures   |

## RANGE STATEMENT

Potential sources of revenue include:

- grants or sponsorship
- sales –tickets,food,beverage or souvenirs
- dispersal of assets and surplus inventory

Expenses include:

- programming and production
- marketing and promotion
- administration and human resources
- committee needs

Financial systems and process include:

- procurements for purchase orders and number of quotes
- monetary handling
- payment process
- financial report on event viability

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know

1. how develop charts of accounts, revenues and expenses
2. how to perform cost benefit analysis
3. how to determine fixed and variable costs
4. how to establish financial controls and procedures

## EVIDENCE GUIDE

### 1. Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- develop budgets
- establish financial controls and procedures
- prepare budgets including breakdown of revenues and expenses
- determine fixed and variable costs, break even and profit position

### 2. Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate

must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

### **3. Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00540: Use Management Skills to Plan an Event

## Unit Descriptor:

This unit deals with the skills and knowledge required to research an event to identify the main requirements for the event, evaluate how feasible the proposed requirements are and to negotiate and agree on a final brief before further planning takes place

| <b>ELEMENTS</b>             |   | <b>PERFORMANCE CRITERIA</b> |  |
|-----------------------------|---|-----------------------------|--|
| Candidates must be able to: |   |                             |  |
| 1                           | Research and agree on the scope of an event | 1.1                         | Identify, collect and analyse the information required                                   |
|                             |   | 1.2                         | Identify the event's requirements  |
|                             |   | 1.3                         | Identify and analyse the relevant market research and information about similar events   |
|                             |   | 1.4                         | Identify and analyse any legal and regulatory requirements                               |
|                             |   | 1.5                         | Identify and analyse financial viability and sustainability of the event                 |
|                             |   | 1.6                         | Evaluate and report on the feasibility and potential of the proposed event               |
|                             |   | 1.7                         | Obtain agreement with the stakeholders and relevant colleagues on the event requirements |
|                             |   | 1.8                         | Compile all relevant information in a manner that will help to plan the event            |
| 2                           | Develop a business plan                     | 2.1                         | Identify business plan requirements  |
|                             |   | 2.2                         | Research event including competitive analysis  |
|                             |   | 2.3                         | Guide development of mission statement, goals and objectives for the event               |
|                             |   | 2.4                         | Write business plan and develop strategies to meet event objectives                      |
|                             |   | 2.5                         | Obtain approval / consensus with governing body/committee                                |
| 3                           | Develop a critical path                     | 3.1                         | Determine timelines and critical dates   |
|                             |   | 3.2                         | Assign tasks to specific committees or individuals                                       |



- |   |   |     |   |
|---|---|-----|---|
|   |   | 3.3 | Review progress regularly and make necessary adjustments where necessary                                      |
|   |   | 3.4 | Review critical path regularly and analyse variances between estimated and actual time needed to attain goals |
|   |   | 3.5 | Communicate with committees and record progress for future planning strategies                                |
| 4 | Evaluate an event                           | 4.1 | Identify areas to be evaluated  |
|   |   | 4.2 | Determine purpose of evaluation   |
|   |   | 4.3 | Implement strategy in accordance with critical path approach  |
|   |   | 4.4 | Review reports and implement recommendations  |
| 5 | Administer reporting and monitoring process | 5.1 | Design system to monitor objectives, tasks and duties   |
|   |   | 5.2 | Make revisions to the monitoring process based on recommendations / input from co coordinators if necessary   |
|   |   | 5.3 | Prepare final reports   |
| 6 | Establish event policies and procedures     | 6.1 | Review and update existing policies and procedures  |
|   |   | 6.2 | Define areas requiring additional policies and procedures   |
|   |   | 6.3 | Draft policies and procedures with the assistance of senior personnel following international best practices  |
|   |   | 6.4 | Acquire approval/ consensus from event stakeholders   |
|   |   | 6.5 | Communicate policies and procedures to relevant persons   |
| 7 | Oversee committees                          | 7.1 | Establish committee requirements  |
|   |   | 7.2 | Select or recommend committee chairperson and /or members   |
|   |   | 7.3 | Assist committees where necessary   |

## RANGE STATEMENT

Information required include:

Event's requirements include:

- record from previous events
- complementary or conflicting events
- surveys
- evaluations
- reference books and trade publications
- stakeholders
- aims and objectives of the event
- concepts and themes of the event
- financial goals
- timing, size and location of the event
- available resources
- critical success factors

Business plan requirements include:

- mission statement, goals and objectives
- administration
- logistics/operations
- event evaluation
- leadership and management
- human resources
- marketing

Strategy include:

- design evaluation
- policies and procedures
- organisation charts
- contracts

Stakeholders include:

- environmental authorities
- national security
- fire authorities
- client/company/NGO
- board of directors or trustees

Areas to be evaluated

- mission, goals and objectives
- human resources
- marketing
- demographics

Relevant persons include:

- co coordinator
- governing body/client
- staff
- volunteers
- event attendees
- suppliers/event vendor

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. how to conduct researches for event requirements and scope
2. how to analyse market research
3. what are the components of a business plan
4. how to develop a business plan
5. what is an event critical path
6. how to develop an event critical path
7. how to establish event policies and procedures
8. how to design system to monitor objectives, tasks and duties
9. how to establish committee requirements

**EVIDENCE GUIDE****1. Critical Aspects of Evidence**

Evidence should include a demonstrated ability to:

- develop a critical path for an event
- administer reporting and monitoring processes
- develop a business plan
- evaluate an event
- establish committee requirements
- establish event policies and procedures

**2 Method of Assessment**

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

**3 Context of Assessment**

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams

## BS00541: Manage Event Merchandise

## Unit Descriptor:

This unit deals with the skills and knowledge required to create, source, distribute and manage the overall process of event merchandising.

| <b>ELEMENTS</b>             |   | <b>PERFORMANCE CRITERIA</b> |   |
|-----------------------------|---|-----------------------------|---|
| Candidates must be able to: |   |                             |   |
| 1                           | Develop product design and specifications | 1.1                         | Leverage post event merchandising sales opportunities   |
|                             |   | 1.2                         | Review historical data  |
|                             |   | 1.3                         | Research customer needs and interests   |
|                             |   | 1.4                         | Assess need to modify or discontinue existing merchandise   |
|                             |   | 1.5                         | Determine potential liabilities and legalities associated with merchandise  |
|                             |   | 1.6                         | Define product design and production specifications   |
|                             |   | 1.7                         | Identify other/new market opportunities   |
|                             |   | 1.8                         | Integrate product concepts with other marketing activities  |
| 2                           | Determine pricing and selling method      | 2.1                         | Calculate direct and indirect costs   |
|                             |   | 2.2                         | Determine profit requirements   |
|                             |   | 2.3                         | Research pricing of similar merchandise   |
|                             |   | 2.4                         | Assess competition and review historical data   |
|                             |   | 2.5                         | Set prices for each type of merchandise considering price points for target market segments, perceived value and quality of merchandise |
|                             |   | 2.6                         | Determine the selling method  |
| 3                           | Control brand integrity                   | 3.1                         | Assess potential of licensing   |
|                             |   | 3.2                         | Negotiate licensing controls and concessions  |
|                             |   | 3.3                         | Establish specifications for commemorative or legacy products   |

|   |                              |     |  |
|---|------------------------------|-----|--|
|   |                              | 3.4 | Protect brand integrity by establishing means to differentiate between real product and replicas                         |
| 4 | Produce event merchandise    | 4.1 | Source suitable merchandise manufacturers  |
|   |                              | 4.2 | Negotiate purchase agreements  |
|   |                              | 4.3 | Determine quantities of merchandise  |
|   |                              | 4.4 | Determine import and export requirements   |
|   |                              | 4.5 | Monitor quality  |
| 5 | Distribute event merchandise | 5.1 | Select best method of distribution considering location, traffic areas, distribution time and cost and inventory control |
|   |                              | 5.2 | Determine physical and/or online sales outlets   |
|   |                              | 5.3 | Negotiate distributions agreements   |
|   |                              | 5.4 | Establish inventory managements systems  |
|   |                              | 5.5 | Determine shipping arrangements and associated shipping costs  |
|   |                              | 5.6 | Co ordinate distribution of suitable point of purchase and other sales displays  |

## RANGE STATEMENT

Historical data include:

- types of mechanising-how and where sold
- price points

Marketing activities include:

- advertising poster upgraded to merchandise quality poster

Selling method include:

- wholesale
- direct retail
- mail order
- commission
- consignment

## UNDERPINNING KNOWLEDGE & SKILLS

Candidates must know:

1. what are the historical data on past merchandise
2. what are the historical data on price points of previous merchandise
3. how to brand events and prepare relevant messaging
4. what are the procurement processes
5. distribute event merchandise
6. produce event merchandise
7. control brand integrity
8. develop product design and specifications

## EVIDENCE GUIDE

### (1) Critical Aspects of Evidence

Evidence should include a demonstrated ability to:

- identify market opportunities
- co ordinate distribution of suitable point of purchase and other sales displays
- research customer needs and interest
- distribute event merchandise
- produce event merchandise
- control brand integrity
- develop product design and specifications

### (2) Method of Assessment

Assessors should gather a range of evidence, over a period of time, which is valid, sufficient and authentic. Evidence should be gathered through a variety of ways including direct observation and oral questioning. Questioning techniques should not require language, literacy and numeracy skills beyond those required in this unit competency. The candidate must have access to all tools, equipment, materials and documentation required. The candidate must be permitted to refer to any relevant workplace procedures, manufacturer's specifications, codes, standards, manuals and reference materials

### (3) Context of Assessment

This unit may be assessed on the job or off the job. Where assessment is done off the job, an appropriate simulation must be used where the range of conditions reflects realistic workplace situations. The competencies covered by this unit would be demonstrated by working individually or in teams