|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Course Name:** | | **BSB50415 Diploma of Business Administration** | | | | | | |
| **Unit Name:** | | BSBADM502 & 503 Manage meetings and Conferences | | | | | | |
| **Please fill in your details** | | | | | | | | |
| **Student Number** | |  | | | | | | |
| **Student Name** | |  | | | | | | |
| **Current Address** | |  | | | | | | |
| **Email** | |  | | | | | | |
| Assessor Name: | | | | | | | | |
|  | | | | | | | | |
| Result | Individual Assessments result | | Assessment 1 | S **🞎** NS **🞎** | | Final Result | | **C 🞎** |
| Assessment 2 | S **🞎** NS **🞎** | |
| Assessment 3 | S **🞎** NS **🞎** | | **NC 🞎** |
|  | Assessment 4 | S **🞎** NS **🞎** | |  | |  |
|  | Assessment 5 | S **🞎** NS **🞎** | |  | |  |
|  | Assessment 6 | S **🞎** NS **🞎** | |  | |  |
| **Assessor Signature** |  | | | Date | |  | | |
| Feedback to Student | | | | | | | | |
|  | | | | | | | | |
| **I have received the Assessment Feedback on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(Date)** | | | | | | | | |
| Students Signature | |  | | | | | | |
| Assessor Signature | |  | | | Date | |  | |

# Assessment 1: Prepare for meetings

|  |  |
| --- | --- |
| Student’s Name |  |
| Assessor’s Name |  |

#### Performance objective

Students are to demonstrate the skills and knowledge necessary to prepare for a meeting in accordance with organisational requirements.

#### Assessment description

Students are required to prepare for a meeting to be conducted in class as a simulated workplace environment.

#### Procedure

1. For those completing this assessment outside the workplace(classroom), choose one of the following meetings to conduct in a simulated workplace.
   * Agree on a business retreat destination from the following list.
     1. Fiji
     2. Noosa
     3. Melbourne.
   * Develop a fire evacuation plan and procedure for a simulated business.
   * Agree on a cleaning procedure for a simulated business.
2. **Develop a meeting agenda** using templates used by your organisation or the template provided in the Appendix.
3. Identify meeting participants and detail the reason/s they should attend the meeting. Prepare a short notice of meeting to be sent to the attendees.
4. Identify the format of your meeting and explain why you have chosen this format.
5. Develop an invitation to notify participants of your meeting and explain the format of your invitation and why you chose this format. Use this invitation to notify participants of your meeting.
6. Prepare required meeting papers. You must identify at least one meeting paper required for your meeting.

#### Specifications

The following is a list of items you must submit to your facilitator/assessor.

Submit your meeting agenda using templates used by your organisation or the template provided in the Appendix

Submit your Notice of Meeting / the invitation you used to notify participants of your meeting.

Submit a copy of the required meeting paper(s).

Your assessor will be looking for the following items to be covered.

Identification of the following meeting requirements in your agenda and /or your notice of meeting

* date
* time
* duration
* meeting purpose
* budget
* meeting host or chair person
* meeting speakers
* agenda
* participants (internal and external)
* special needs of participants
* location preferences
* seating arrangements – theatre style, table and chairs
* pre-reading materials for attendees
* documentation requirements for the meeting
* equipment required for the meeting, e.g. video/data projector, microphone, whiteboard
* teleconferencing or videoconferencing requirements and equipment
* catering.

The meeting agenda should detail:

* date, time and location of meeting
* statement of the meetings purpose
* welcoming
* minutes of the previous meeting
* major agenda items
* general business
* date of next meeting.

The notice of meeting / meeting invitation includes the following information.

* start time
* end time
* date
* location
* RSVP date if applicable
* who is attending
* purpose of meeting
* agenda
* pre-reading requirements
* travel and accommodation details if applicable
* Teleconference details if applicable.

Demonstration of an understanding of effective delegation skills when developing and implementing the action plan by:

* delegating tasks to multiple people
* clear definition of task and timeframe
* tasks completed as required by the person they were delegated to
* action plan goals achieved.

## Appendix 1: Assessment Task 1 submission form

|  |  |
| --- | --- |
| **Student name** |  |

|  |  |
| --- | --- |
| **Meeting name:** |  |
| **Meeting purpose:** |  |

### Participants

|  |  |
| --- | --- |
| **Participant name** | **Reason for participation** |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

### Meeting format

What format have you chosen for this meeting and why?

|  |
| --- |
|  |

### Invitation

What format did you use for your invitation and why did you choose this format?

|  |
| --- |
|  |

### Meeting papers

Describe the meeting papers you were required to prepare and the distribution method you used to provide those papers to participants. Why did you choose the distribution method that you used?

|  |
| --- |
|  |

### Delegation

Describe your approach to delegating activities and managing the completion of those tasks. Were all activities completed by the person to whom you delegated the task to and on time? Did you achieve the goals of your action plan?

|  |
| --- |
|  |

## Appendix 3: Meeting agenda (use supplied template )

The template supplied in class in paper form may be used or you may source it from the Whiteboard

# Marking Guide

## Assessment Task 1:Assignment: Prepare for meetings

|  |  |
| --- | --- |
| Student’s Name |  |
| Assessor’s Name |  |

#### Outcomes

|  |  |  |
| --- | --- | --- |
| Did the Student: | Satisfactory | |
| Yes | No |
|  |  |  |
|  |  |  |
| Submit a meeting agenda using a template used by their organisation or the template provided in Appendix 3? |  |  |
|  |  |  |
| Submit a copy of the invitation used to notify participants of the meeting? |  |  |
| Submit a copy of the required meeting papers? |  |  |
| Submit a copy of any othe materials to support your meeting |  |  |

#### Performance indicators

| Did the Student: | Satisfactory | |
| --- | --- | --- |
| Yes | No |
| Complete Appendix ‘Assessment Submission Form’ using clear and concise language? |  |  |
| Choose a meeting format that is appropriate for the purpose of the meeting and will assist with achieving the goals of the meeting? |  |  |
| Identify the following meeting requirements?   * date * time * duration * meeting purpose * budget * meeting host or chair person * meeting speakers * agenda * participants (internal and external) * special needs of participants * location preferences * seating arrangements – theatre style, table and chairs * pre-reading materials for attendees * documentation requirements for the meeting * equipment required for the meeting e.g. video/data projector, microphone, whiteboard * teleconferencing or videoconferencing requirements and equipment * catering. |  |  |
| Develop a meeting agenda that includes the following information?   * date, time and location of meeting * statement of the meeting’s purpose * welcome * minutes of the previous meeting * major agenda items * general business * date of next meeting. |  |  |
| Develop a meeting invitation that details the following?   * start time * end time * date * location * RSVP date if applicable * who is attending * purpose of meeting * agenda * pre-reading requirements * travel and accommodation details if applicable * teleconference details if applicable. |  |  |
| Use an appropriate format to the send the invitation to participants? |  |  |
| Prepare meeting papers that are relevant to the purpose of the meeting and contribute to the achievement of the meeting goals? |  |  |
| Develop an action plan to make the meeting arrangements that detail all the tasks that are to be completed, who is responsible for completing the task and when the task is due to be completed by? |  |  |
| Demonstrate an understanding of effective delegation skills when developing and implementing an action plan by:   * delegating tasks to multiple people * clearly defining the task and timeframe * ensuring tasks were completed as required by the person they were delegated to * ensuring action plan goals were achieved? |  |  |

#### Comments/feedback to participant

|  |  |
| --- | --- |
|  | |
|  | |
|  | |
|  | |
| Outcome: | 🞏 Successful 🞏 Unsuccessful |
| Assessor name: |  |
| Assessor signature: |  |

# Assessment 2: Project :Conduct meetings

|  |  |
| --- | --- |
| Student’s Name |  |
| Assessor’s Name |  |

#### Performance objective

Students are to demonstrate the skills and knowledge required to conduct and chair meetings, and to ensure that the desired outcomes of the meeting are achieved.

#### Assessment description

This Assessment continues from, and builds upon, the work completed in Assessment Task 1.

In this assessment you are required to conduct the meeting that you planned in Assessment Task 1.

#### Procedure

1. Review your documents from assessment 1 and use these documents to complete this assessment.
2. Access any action plans developed in Assessment Task 1.
3. Review this action plan and ensure that all tasks have been completed in preparation for the meeting you are to conduct and chair.
4. Where any preparatory tasks have not been completed, ensure these are completed before the next step.
5. **Conduct and chair the meeting** and ask participants to complete the ‘Meeting participant evaluation form’ in Appendix 2.
6. During the meeting you are required to:
   1. resolve at least one issue using a problem-solving technique
   2. make a decision using a logical decision-making process which you must document.
7. Identify a minute taker and brief them on your requirements regarding meeting minutes.

#### Specifications

The following is a list of items you must submit to your facilitator/assessor.

Submit copies of completed ‘Participant evaluation forms’ in the Appendix.

Submit a copy of the completed ‘Minute taker evaluation form’ in   
Appendix 3.

For those completing this assessment outside the workplace, submit a copy of the meeting guidelines you developed with your meeting participants.

Your assessor will be looking for the following items to be covered.

* All sections of Appendix 1 ‘Assessment Task 2 submission form’ are completed using clear and concise language.
* Evidence of identification of organisational requirements, applicable conventions and legal and ethical requirements including:
  1. organisational requirements such as:
  + limiting meeting durations
  + meeting agenda must be documented for all meetings
  + meeting minutes must be captured for all meetings
  + delegates must have the authority to make decisions
  + meetings must start and finish on time
  + all meetings must have a designated chairperson
  + participants must arrive on time
  + mobile phones are to be switched off
  + one person to speak at a time.
  1. Applicable conventions such as:
  + chairperson has casting vote
  + conflict of interest provisions
  + consensus is required for all decisions
  + majority of members to agree for all decisions
  + process for moving and seconding formal motions
  + discussions are restricted to agenda items only
  + all discussion to be directed through the chairperson
  + quorum
  + time limit on speakers
  + voting procedures.
  1. Legal and ethical requirements such as:
  + Companies Act
  + company’s Articles of Association
  + workplace legislation including, anti-discrimination, OHS, harassment, etc.

For those completing this assessment outside the workplace, meeting guidelines provide evidence of an understanding of the types of guidelines organisations provide to employees to govern the way in which meetings are conducted.

Evidence that as chairperson you:

* communicate a clear understanding of the meeting purpose
* keep discussions focused on achieving the purpose of the meeting
* maintain control of the meeting throughout the duration
* ensure all participants are involved in discussions
* facilitate problem-solving through the use of problem-solving techniques and tools to resolve any issues
* facilitate decision-making through the use of a logical process that generated positive results
* conduct meetings according to the agenda
* facilitate the achievement of an outcome
* Commence and conclude the meeting on time.
* Evidence that as chairperson you appropriately brief your minute taker on the following.
  1. Clearly explaining the purpose of the meeting.
  2. Providing information regarding attendees prior to the meeting.
  3. Providing a copy of a minute template.
  4. Explaining any organisational requirements/conventions for recording the meeting minutes.
  5. Explaining the required method for recording meeting notes and your expectations with regards to the level of detail of information recorded.
  6. Providing examples of previous minutes to assist the minute taker with understanding what was required.
* Complete the following in brief bullet point format

|  |  |
| --- | --- |
| **Legal and ethical requirements of your meeting** |  |

#### Problem-solving

Describe a problem that had to be solved during your meeting?

|  |
| --- |
|  |

Which problem-solving technique did you use and why?

|  |
| --- |
|  |

How did this technique assist you to solve the problem?

|  |
| --- |
|  |

### Decision-making

Describe the process you adopted to assist you in making decisions during the meeting.

|  |
| --- |
|  |

What did you find challenging about the decision-making process you used?

|  |
| --- |
|  |

#### Chairing and facilitating meeting outcomes

Reflect on your role as chairperson of this meeting and answer the following questions.

How would you assess your performance in chairing the meeting (i.e. were you an effective chairperson or are improvements needed)?

|  |
| --- |
|  |

What was the desired outcome of your meeting and did you achieve it?

|  |
| --- |
|  |

Describe the strategies you used to facilitate the outcome.

|  |
| --- |
|  |

What strategies worked well in assisting you to achieve your outcome?

|  |
| --- |
|  |

What could you improve on to assist you to achieve meeting outcomes in the future?

|  |
| --- |
|  |

## Appendix 2: Meeting participant evaluation form

|  |  |
| --- | --- |
| **Student name** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Strongly Agree** | **Agree** | **Neutral** | **Disagree** | **Strongly Disagree** |
| The meeting started on time. |  |  |  |  |  |
| The meeting purpose was clear. |  |  |  |  |  |
| The chairperson kept discussions focused on achieving the purpose of the meeting. |  |  |  |  |  |
| The chairperson maintained control of the meeting throughout the duration. |  |  |  |  |  |
| The chairperson ensured all participants were involved in discussions. |  |  |  |  |  |
| The chairperson facilitated the problem-solving activity to resolve any issues. |  |  |  |  |  |
| The chairperson facilitated decision-making to ensure required decisions were made. |  |  |  |  |  |
| The meeting followed the agenda. |  |  |  |  |  |
| The desired outcome for the meeting was achieved. |  |  |  |  |  |
| The meeting concluded on time. |  |  |  |  |  |
| General feedback regarding the way in which the meeting was conducted: | | | | | |
|  | | | | | |

## Appendix 3: Minute taker evaluation form

|  |  |
| --- | --- |
| **Student name** |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
|  | **Strongly Agree** | **Agree** | **Neutral** | **Disagree** | **Strongly Disagree** |
| The chairperson clearly explained the meeting purpose and the expected outcomes. |  |  |  |  |  |
| I was provided with a list of the attendees and their roles prior to the meeting. |  |  |  |  |  |
| I was provided a copy of a minute template to use to record the meeting discussions. |  |  |  |  |  |
| The chairperson explained any organisational requirements/conventions for recording the meeting minutes. |  |  |  |  |  |
| The chairperson explained the required method for recording meeting notes and their expectations with regards to the level of detail of information recorded. |  |  |  |  |  |
| I was provided with examples of previous minutes to assist me with understanding what was required. |  |  |  |  |  |
| It was clear to me what was expected. |  |  |  |  |  |
| General feedback regarding the information you were provided regarding taking minutes for the meeting: | | | | | |
|  | | | | | |

# Marking Guide

## Assessment Task 2: Project: Conduct meetings

|  |  |
| --- | --- |
| Student’s Name |  |
| Assessor’s Name |  |

#### Outcomes

|  |  |  |
| --- | --- | --- |
| Did the Student: | Satisfactory | |
| Yes | No |
| Submit a completed Appendix 1 ‘Assessment 2 Submission Form’? |  |  |
| Submit copies of completed participant ‘Evaluation Form’ in Appendix 1? |  |  |
| Submit a copy of the completed minute-taker ‘Evaluation Form’ in Appendix 1? |  |  |
| For those completing this assessment outside the workplace, submit a copy of the meeting guidelines developed with meeting participants? |  |  |

#### Performance indicators

| Did the Student: | Satisfactory | |
| --- | --- | --- |
| Yes | No |
| Complete Appendix 1 ‘Assessment 2 Submission Form’ using clear and concise language? |  |  |
| For those completing this assessment within the workplace, did the Student provide evidence of identification and understanding of organisational requirements such as:   * limited meeting durations * meeting agenda must be documented for all meetings   1. meeting minutes must be captured for all meetings. * delegates must have the authority to make decisions * meetings must start and finish on time * all meetings must have a designated chairperson * participants must arrive on time * mobile phones are to be switched off * one person is to speak at a time? |  |  |
| For those completing this assessment outside the workplace, did the meeting guidelines developed provide evidence of an understanding of the types of guidelines organisations provide to employees to govern the way in which meetings are conducted? |  |  |
| Provide evidence of identification and understanding of applicable conventions such as:   * chairperson has casting vote * conflict of interest provisions * consensus is required for all decisions * majority of members to agree for all decisions * process for moving and seconding formal motions * discussions are restricted to agenda items only * all discussion to be directed through the chairperson * quorum * time limit on speakers * voting procedures? |  |  |
| Provide evidence of identification and understanding of legal and ethical requirements such as:   * Companies Act * Companies Articles of Association * workplace legislation including, anti-discrimination, OHS, harassment, etc.? |  |  |
| Does the completed meeting participant evaluation form provide evidence that as chairperson the Student:   * communicated a clear understanding of the meeting purpose * kept discussions focused on achieving the purpose of the meeting * maintained control of the meeting throughout the duration * ensured all participants were involved in discussions * facilitated problem-solving through the use of problem-solving techniques and tools to resolve any issues * facilitated decision making, through the use of a logical process that generated positive results * conducted the meeting according to the agenda * facilitated the achievement of an outcome * commenced and concluded the meeting on time? |  |  |
| Does the completed minute-taker evaluation form provide evidence that as chairperson the Student appropriately briefed the minute-taker including;   * clearly explaining the meeting purpose * providing information regarding attendees prior to the meeting * providing a copy of a minutes template * explaining any organisational requirements and/or conventions for recording the meeting minutes * explaining the required method for recording meeting notes and your expectations with regards to the level of detail of information recorded * providing examples of previous minutes to assist the minute-taker with understanding what was required? |  |  |

#### Comments/feedback to participant

|  |  |
| --- | --- |
|  | |
|  | |
|  | |
|  | |
|  | |
| Outcome: | 🞏 Successful 🞏 Unsuccessful |
| Assessor name: |  |
| Assessor signature: |  |

# Assessment 3: Case Study – Part A: Conference concept

#### Performance objective

Students will need to conduct individual research of available materials and local resources (web, phone book, etc.) and show initiative and problem-solving skills to outline the plan for a conference.

#### Assessment description

For this task, you are required to complete a conference concept document. The concept document is designed to help a conference manager in developing a scoping document for a conference to be held. You are required to review the case study outline below, and create and complete all aspects of the concept document.

#### Case study

You are one of the senior administrative staff who work in the marketing department of MacVille Pty Ltd. The MacVille events steering committee with ultimate authority in convening the conference have requested that you plan and manage a conference that they would like run in the next 4–6 months.

The purpose of the conference is to promote the Mezzo range of imported Italian espresso that the firm has recently secured the rights to distribute in Australia. MacVille senior management believe that the conference will primarily secure sales leads of the espresso coffee machines as well as increase awareness of MacVille’s association with the specialist espresso coffee market and build relationships between MacVille and its clients. These conferences will be held in every major city in Australia, but yours is the firsts in the series.

The target market for the conference is the owners and managers of retail coffee shops. It is anticipated that 40–60 people will attend. Included in your instructions from the MacVille events steering committee are that the conference should be for one day and culminate with a dinner.

You have also been instructed to design a conference that breaks even on costs. The budget you have been allocated is $25,000. The steering committee have suggested that engaging the right keynote speaker coupled with an interesting program should make the registration fee you set, well accepted by the target market.

The MacVille events steering committee have asked you to first prepare a conference concept document for their approval.

#### Procedure

You are required to:

1. Review the case scenario outlined above.
2. Complete a conference concept document.
3. Submit the completed document.

#### Specifications

You must provide:

* Completed conference concept document.

Your assessor will be looking to see that each area of the conference concept has been addressed, including:

* clearly defined purpose, and reason for holding the conference
* the style and type of conference
* a clear description of the target market
* a list of the benefits to the business
* a clearly defined communication strategy
* accurately documented planning and preparation details
* outline of the type of resources required
* clearly defined and accurate systems and timelines to manage the event
* balanced and accurate financial report
* An outline of potential barriers and address all contingency situations as they arise.

#### Conference concept instructions

Create and complete a conference concept document using the headings provided below.

#### Purpose

Explain briefly what the conference is, what it’s for and who the target attendee is, and how this ties in with the strategic direction and mission of your organisation. This is a statement of purpose. Also include a brief concept statement of the format of the conference, as well as a very rough overview of the program you are imagining.

#### Type

Explain the type of conference it will be, and why this type of event is the most suitable for your target attendee.

#### Benefits

Describe the types of benefits and outcomes you expect attendees or others to receive from this conference.

#### When, Where and Who

Briefly describe approximately when and where the conference will be, as well as the expected number of attendees. In particular, check the timing of the conference does not clash with any other key events for your organisation or for target attendees.

#### Resources

Describe broadly what resources (facilities, equipment and people) are available or accessible to support the conference?

**Note:** Especially which of these may need to be hired, purchased or tasked from another department or part of the organisation.

#### Time

Is there sufficient time for planning and organising the event? In particular, do you have sufficient human resources to ensure you achieve deadlines in the lead up to the event?

#### Financials

What are the estimated costs (time, personnel, money)? What is the estimated income (money and in-kind)? This should not be a detailed budget, just an overview of your estimates for these figures.

#### Barriers

What barriers could present for this conference? How can any potential barriers be overcome?

#### Summary

Your final thoughts and comments about the feasibility of running this conference.

## Marking Guide: Assessment Task 3: Case Study – Part A: Conference concept

|  |  |
| --- | --- |
| Student’s name |  |
| Assessor’s name |  |

#### Outcomes

|  |  |  |
| --- | --- | --- |
| Assessment specification: | Satisfactory | |
| Yes | No |
| Conference concept document is complete and instructions correctly followed. |  |  |
| Report is submitted in agreed timeframe. |  |  |

#### Performance indicators

| Did the Student: | Satisfactory | |
| --- | --- | --- |
| Yes | No |
| Explain briefly what the conference is for, what it is about and the audience to be targeted; linking these to the direction and mission of the organisation? |  |  |
| Include a brief concept statement for the format of the conference and an overview of the program? |  |  |
| Explain why the type of conference is suited to the target audience? |  |  |
| Describe the types of benefits attendees would gain from the conference? |  |  |
| Include the location, timing, number of attendees and date of the conference; ensuring that the timing does not clash with important calendar dates for attendees and the organisation? |  |  |
| Describe available resources for conference support; noting the process required to attain these resources, e.g. hire, buy, request? |  |  |
| Ensure adequate time and resources are available for planning? |  |  |
| Provide an overview of estimated costs and income? |  |  |
| Consider potential obstacles and how they might be overcome? |  |  |
| Include a summary regarding the overall feasibility of running the conference? |  |  |

#### Comments/feedback to participant

|  |  |
| --- | --- |
|  | |
|  | |
|  | |
|  | |
|  | |
| Outcome: | 🞏 Successful 🞏 Unsuccessful |
| Assessor name: |  |
| Assessor signature: |  |

# 

**PLEASE ENSURE THAT THIS IS BRIEF, CONCISE AND RELATED TO THE POINTS GIVEN 2 to 3 LINES at most FOR EACH HEADING**

#### Performance objective

Students will need to continue their research and planning, using initiative to develop a full conference plan that meets the needs of the organisation.

#### Assessment description

For this task, you are required to create and complete a conference plan. You are required to review the case study outline below, and create and complete all aspects of the plan. A venue location map should be submitted alongside the conference plan.

#### Case study

The MacVille events steering committee have approved your conference concept for the espresso coffee machine launch and now require you to prepare a conference plan document. MacVille have some existing planning templates that you will need to complete and include in your documentation. This plan will document the research, planning and decisions you make as you plan for the conference.

You will use your previously completed and approved conference concept document to inform the completion of the conference plan. This plan must include the following:

* the conference runs for one day and will include dinner
* MacVille’s primarily expected outcome is to secure sales leads for the Mezzo range of espresso coffee machines
* you report to the MacVille events steering committee
* your budget is $25,000 and you will have the sales manager and two MacVille Espresso sales people at the conference to help you with organising and presenting
* the venue choice is to be held in your city or the closest geographically located major city
* speakers can be keynote and company presenters
* an income and expenditure budget
* Your target audience is owners and managers of retail coffee shops within the surrounding geographic zone.

#### Procedure

You are required to:

1. Review the case scenario outlined above.
2. Create and complete a conference plan document.
3. Source a venue location map, and attach it to the conference plan.
4. Submit the completed document with the location map.

#### Specifications

You must provide:

* completed conference plan document
* A location map for the venue which states (country), city, suburb/district and appropriate transport options for travel to the venue.

Your assessor will be looking for:

* each area of the conference plan being addressed (see instructions below)
* a clear, easy to read location map showing the venue relative to local streets and landmarks.

### Conference plan instructions...

#### Scope

The inclusions/exclusions – a description of what is and what isn’t within the requirements for management of this conference. This should particularly describe any items that you know are high priorities for your organisation, and any items that you know have expressly been excluded. (e.g. ‘*Don’t worry about organising security staff, the venue will deal with that.’*)

#### Reporting

The ‘who’ – a description of who you report to and answer to (these may be different people or groups) leading up to and throughout this conference. In particular you must outline lines of authority, and the budget approval process, and should reflect organisational policy and procedure.

#### Constraints

The limits are a description of any constraints for the conference. Some common ones may be:

* cost, where there is a fixed budget with no possible extensions
* attendees, where there is an absolute upper or lower limit for attendees
* Legal’s, where various forms of legislation may affect proceeding.

### Preparation

#### Venue

The ‘where’ – details of the venue you have identified as suitable with a description of the alternate venues that you have chosen from. Include in your description the key criteria that this venue meets, and the estimate costs for planned usage. Attach to this plan a location map showing where the venue is.

#### Program and purpose

Ensure that the stated purpose of the conference is met with an appropriate and balanced conference program.

#### Timeline

A description of all deliverables for this conference, with clearly observable milestones and activities to be detailed. Ensure you include details of when you need to finalise details for speakers, venue, publicity materials and conference programme. See attached template.

#### Speakers

A description of the presenters and guest speakers to speak at the conference. The description should include the relevance of the speaker to the target audience, and the total cost for them, including transport, accommodation, hospitality, etc. See attached template.

#### Target Audience

A description of the intended target audience who you wish to attend the conference and their identification and acknowledgement by conference organisers.

#### Budget

A full budget breakdown describing all expected costs and attendee income. See attached template.

#### Risk management

A description of the risks associated with organising and running the conference, along with the type of risk (external, technical, organisational, other) ways to mitigate and contingency manage the risk, and the level of the risk (high, medium, low). See attached template.

#### Promotional strategy

A description of how the conference will be promoted to the identified target audience, including thoughts for the mediums to be used to promote and follow-up conference information being released to potential attendees.

#### Monitoring

A description of how the planning and management of the conference will be monitored throughout both the planning and management stages. Ensure you discuss how you will monitor the two key stages (preparation and management) together with how you will communicate any actions that need to be taken to address significant variations from the conference plan, both leading up to and within the conference.

#### Budget template

|  |  |  |
| --- | --- | --- |
| Item | Description/purpose | Cost |
| Income | *Based on expected number of attendees* |  |
| Expenses | | |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **Total expenses** | |  |
| **Surplus/deficit** | |  |

#### Risk management template

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Risk | Type | Mitigation | Contingency | Level(L,M,H) |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

# Marking Guide

## Assessment Task 4: Case Study: Part B: Conference plan

|  |  |
| --- | --- |
| Student’s name |  |
| Assessor’s name |  |

#### Outcomes

|  |  |  |
| --- | --- | --- |
| Assessment specifications: | Satisfactory | |
| Yes | No |
| Conference plan completed and instructions correctly followed. |  |  |
| Venue location map provided. |  |  |
| Plan and map submitted within agreed timeframe. |  |  |

#### Performance indicators

| Did the Student: | Satisfactory | |
| --- | --- | --- |
| Yes | No |
| Provide a clear venue map including an appropriate level of detail and includes some details of surrounding area? |  |  |
| Explain how the program and purpose of the conference is appropriate to the conference program? |  |  |
| Outline which conference requirements need to be addressed and which are already accounted for? |  |  |
| Explain reporting procedures/provide a hierarchy of authority? |  |  |
| Outline limitations involving finances, attendance or legal requirements? |  |  |
| Describe the costs and benefits of the preferred and alternative venues? |  |  |
| Prepare a timeline demonstrating how planning requirements would be met prior to the conference? |  |  |
| Develop a budget detailing all estimated costs and income? |  |  |
| List potential risks including an adequate description of risk type, level and contingency plan? |  |  |
| Produce a monitoring procedure for the preparation and management stages that includes a method of communicating any required changes? |  |  |

#### Comments/feedback to participant

|  |  |
| --- | --- |
|  | |
|  | |
|  | |
|  | |
|  | |
| Outcome: | 🞏 Successful 🞏 Unsuccessful |
| Assessor name: |  |
| Assessor signature: |  |
| Comments/feedback to participant | |
|  | |
|  | |
|  | |
|  | |

# Assessment 5: Conference problems

#### Performance objective

Students will need to respond in writing to a series of issues presented to them in the context of the conference. Written responses provided by Students will need to reflect the role of the conference team and any available human resources for the conference, and will need to show initiative in handling problems in the course of the conference.

#### Assessment description

For this task you are required to provide written responses to a series of unscheduled changes to the conference program, as if the conference is running.

#### Procedure

You are required to:

1. Review the case scenario outlined in Assessment Task 1.
2. Read the five (5) issues outlined on the following page.
3. Respond in writing with a strategy for each of the issues described, on the paper provided.
4. Submit final strategies in response to all five (5) issues within the time constraint agreed.
5. If you do not understand any questions or the issue being presented, ask your assessor for help.

#### Specifications

You must:

* provide written strategies in response to the five (5) case study conference issues
* Complete this task within 30 minutes.

Your assessor will be looking for a completed Risk Management Strategy Plan which includes:

* a written strategy addressing each possible issue
* clear initiative and problem-solving skills, within the constraints of the conference and available resources shown in each response
* Responses supplied within the agreed timeframe.

Respond to the following issues:

1. During registration, 30 minutes before the start of proceedings, a delegate mentions that they had forgotten to inform us of their peanut allergy. They inform us that it is a severe allergy (anaphylactic shock), and that they cannot even shake hands with someone who has touched peanuts without an immediate reaction. You must ensure that all access and equity issues are clearly addressed for all delegates and that the delegate's privacy is respected.
2. During registration, with 18 minutes remaining until proceedings commence, you receive an SMS from a member of your team who was scheduled to drive the main guest presenter to the conference. The presenter has slept in and will take at least 90 minutes to get ready. You must ensure that delegates are affected as little as possible and that the presenter is not embarrassed by this slip-up.
3. With just 13 minutes until proceedings are to commence, you are still on the phone to the team member from the previous issue, the MC discovers that there is no VGA cable at the lectern to plug in a laptop for presenters to show their presentations, and the data projector currently available in the conference room is roof mounted.
4. With four minutes to go, an assistant rushes up to you and informs you the venue has set up one table less than required, and you are seven seats short of conference seating requirements (each table seats eight).
5. Seven minutes after the proceedings have started; a late delegate arrives and wants to pay for their registration with cash. The team member at the registration desk has no cash till, as delegates were asked to pay by VISA card or company cheque.

# Marking Guide

## Assessment Task 5:: Conference problems

|  |  |
| --- | --- |
| Student’s name |  |
| Assessor’s name |  |

#### Outcomes

|  |  |  |
| --- | --- | --- |
| Did the Student: | Satisfactory | |
| Yes | No |
| Respond to all issues? |  |  |
| Submit strategies within agree timeframe? |  |  |

#### Performance indicators

| Did the Student: | Satisfactory | |
| --- | --- | --- |
| Yes | No |
| Identify the following key issues in responses?  Answers can include but are not limited to: |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

#### Comments/feedback to participant

|  |  |
| --- | --- |
|  | |
|  | |
|  | |
|  | |
|  | |
| Outcome: | 🞏 Successful 🞏 Unsuccessful |
| Assessor name: |  |
| Assessor signature: |  |

# Assessment 6: Project : Post-conference report -

#### Performance objective

Students will need to develop a written report and present it to their manager/supervisor. They will need to reflect on the role of the team, and how they showed initiative in handling problems in the course of the conference.

#### Assessment description

For this task, you are required to complete a post-conference report and present it to a manager. The template is designed to help a conference manager in developing a post-conference review document. You are required to review the case study outline below, complete all aspects of the template, and present a three to five minute oral summary to their supervisor. After presentation of the summary, you should be prepared to answer and clarify questions if necessary.

#### Case study (as previously used in Assessment Task 1)

You are one of the senior administrative staff working in the marketing department of MacVille Pty Ltd. The MacVille events steering committee with ultimate authority in convening the conference have requested that you plan and manage a conference that they would like run in the next 4–6 months.

The purpose of the conference is to promote the Mezzo range of imported Italian espresso that the firm has recently secured the rights to distribute in Australia. MacVille senior management believe that the conference will primarily secure sales leads of the espresso coffee machines as well as increase awareness of MacVille’s association with the specialist espresso coffee market and build relationships between MacVille and its clients. These conferences will be held in every major city in Australia, but yours is the firsts in the series.

The target market for the conference is the owners and managers of retail coffee shops. It is anticipated that 40–60 people will attend. Included in your instructions from the MacVille events steering committee are that the conference should be for one day and culminate with a dinner.

You have also been instructed to design a conference that breaks even on costs. The budget you have been allocated is $25,000. The steering committee have suggested that engaging the right keynote speaker coupled with an interesting program should make the registration fee you set, well accepted by the target market.

The MacVille events steering committee have asked you to first prepare a conference concept document for their approval.

#### Procedure

You are required to:

1. Review the case scenario outlined above.
2. Create and complete a post-conference report according to the instructions below.
3. Develop a three- to five-minute summary presentation, reflecting the completed report.

#### Specifications

You must provide:

* a completed post-conference report
* a verbal summary conference report.

Your assessor will be looking for:

* each area of the post-conference report being addressed
* a clear, accurate oral summary of the written report
* an ability to answer clarification questions as relevant.

#### Option 1: Assessor as observer

The assessor can ‘observe’ the learner conducting the presentation

Procedure:

* Meet with the assessor via a video conferencing tool at the scheduled time and conduct the presentation.
* The learner is to present their informal presentation with the assessor observing.
* Additional evidence (documents such as feedback questionnaires, photos, videos, etc.) may be required and can be electronic but must conform to the format guidelines provided to the Student.
* A follow-up interview may be required (at the discretion of the assessor).
* Evidence can be submitted electronically or posted in the mail.

#### Post-conference report instructions

Create and complete a post-conference report using the headings provided below. Ensure you include the conference title and current date at the top of the page.

Three brief Powerpoint slides will be sufficient

#### What went well?

Describe what you feel went particularly well about the conference, and any particularly positive feedback you received or heard.

#### What didn’t go well?

Describe what you feel didn’t go smoothly or well for the conference, and any particular issues or concerns you noticed or were informed of.

#### What was lacking?

Describe any areas you felt could have been done or handled better.

#### What wasn’t expected?

*Benefits:* Describe any positive spin-offs that were not anticipated, and the effect of these.

*Problems:* Describe any issues that were not anticipated, and how they impacted on the conference or delegates.

#### Timeline management

Describe how the timeline was managed and how much variance was noted from the planned timeline. What would you change about your timeline planning if you were to run this conference again?

#### Resource management

Describe any issues with management of resources, and how this can be handled for future conferences or events, especially the use of audio-visual resources to support the general presentation of the conference.

#### Budget management

Describe any issues with management of the budget, and how this can be handled for future conferences or events. Also clearly note your final surplus/deficit and explain any variances from the projected budget for the conference. Attach a finalised income and expenses table, clearly detailing all expenses from the conference.

#### Conference presentations

Describe any issues with collating and presenting all of the presenters’ materials as and when they were required, as well as any issues that need to be resolved for future conferences. Also note if all presentation materials and written proceedings are now collated, and ready for distribution.

#### Post conference feedback

Explain the feedback from post conference correspondence. Evaluate whether the attendees responses indicate that the goals of the conference were met.

#### Event manager recommendations

In summary, describe whether the organisational goals for the conference were achieved and generally whether the conference achieved the outcomes described in the initial concept document.

#### Papers for publication

Determine which post conference papers and material is required for publishing.

# Marking Guide

## Assessment Task 6: Project : Post-conference report

|  |  |
| --- | --- |
| Student’s name |  |
| Assessor’s name |  |

#### Outcomes

|  |  |  |
| --- | --- | --- |
| Did the Student: | Satisfactory | |
| Yes | No |
| Complete post-conference report? |  |  |
| Submit report in agreed timeframe? |  |  |
| Orally present a summary of the report? |  |  |

#### Performance indicators

| Did the Student: | Satisfactory | |
| --- | --- | --- |
| Yes | No |
| Complete and attach a budget report? |  |  |
| Describe what aspects of the conference went well, and which areas could use improvement? |  |  |
| Describe problems/benefits that were unforseen? |  |  |
| Summarise budget, resource and timeline management, describing what areas could use improvement? |  |  |
| Discuss the benefits of/improvements to the conference presentations? |  |  |
| Discuss if the conference achieved the goals of the organisation and satisfied the requirements outlined in the initial concept document? |  |  |
| Reflect the content of the report in the oral presentation? |  |  |
| Respond clearly to questions asked for clarification purposes? |  |  |

#### Comments/feedback to participant

|  |  |
| --- | --- |
|  | |
|  | |
|  | |
|  | |
|  | |
| Outcome: | 🞏 Successful 🞏 Unsuccessful |
| Assessor name: |  |
| Assessor signature: |  |