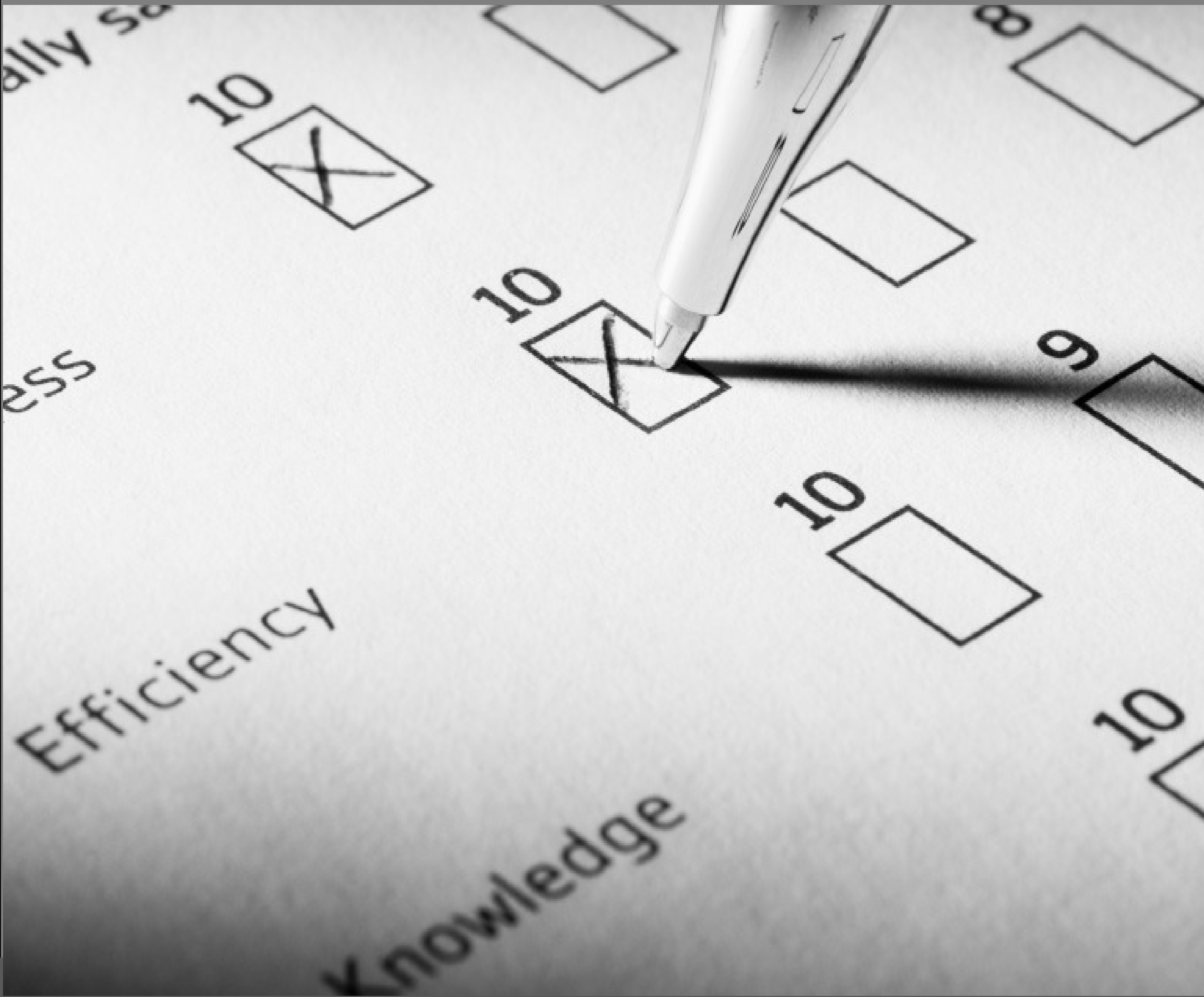
Design, prepare and present various types of reports

D1.HGE.CL7.01
D1.HGA.CL6.08

Assessor Manual



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

Design, prepare and present various types of reports

D1.HGE.CL7.01
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Assessor Manual

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Table of Contents

Competency Based Assessment (CBA) – An Introduction for Assessors

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

Suggested Assessment Methods

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

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

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

Alternative Assessment Methods

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

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

Alternate assessment methods include:

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

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

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

Selection of Assessment Methods

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

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

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

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

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

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

Assessing Competency

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

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

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

Pass Competent (PC)

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

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

Not Yet Competent' (NYC)

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

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

The participant may be required to:

a) Undertake further training or instruction

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

Regional Qualifications Framework and Skills Recognition System

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

The purpose of this framework is to provide:

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

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

Recognition of Prior Learning (RPL)

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

This process is a learning and assessment pathway which encompasses:

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

Code of Practice for Assessors

This Code of Practice provides:

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

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

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

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

Instructions and Checklist for Assessors

Instructions

General instructions for the assessment:

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

Preparation

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

Briefing checklist

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

Checklist for Assessors

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

Instructions for Recording Competency

Specifications for Recording Competency

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

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

Instructions for Different Assessment Methods

Specifications for Work Project Assessment

These guidelines concern the use of work projects.

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

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

Assessors should follow these guidelines:

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

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

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

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

  - You are required to complete these activities:

    a) Using the ‘X’ method of assessment

    b) At ‘X’ location

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

Specifications for Oral Question Assessment

These guidelines concern the use of oral questioning.

Assessors should follow these guidelines.

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

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

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

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

  We have 60 minutes for this assessment.

  - I will give you feedback at the end of the assessment
  - Do you have any questions about this assessment?"
- Commence Oral Questioning assessment:
  - Complete Assessment Record for the Oral Questioning by:
    a) Ticking PC or NYC, as appropriate
    b) Entering 'Remarks' as required
    c) Completing Oral Questioning within 60 minutes
- Complete Oral Questioning and provide feedback to candidate
- Transcribe results/details to Competency Recording Sheet
- Forward/file assessment record.

Specifications for Written Question Assessment

These guidelines concern the use of written questioning.

Assessors should follow these guidelines:

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

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

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

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

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

  We have X time for this assessment:

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

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

Specifications for Observation Checklist

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

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

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

To complete the Observation Checklist the Assessor must:

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

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

Specifications for Third Party Statement

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

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

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

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

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

To complete the Third Party Verification Statement the Assessor must:

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

The Third Party must:

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

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

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

Competency Standard

<table>
<tr><td>UNIT TITLE: DESIGN, PREPARE AND PRESENT VARIOUS TYPES OF REPORTS</td><td>NOMINAL HOURS: 25</td></tr>
<tr><td colspan="2">UNIT NUMBER: D1.HGE.CL7.01 D1.HGA.CL6.08</td></tr>
<tr><td colspan="2">UNIT DESCRIPTOR: This unit deals with skills and knowledge required to develop, produce and present a range of reports used by the hotel industry</td></tr>
<tr><td>ELEMENTS AND PERFORMANCE CRITERIA</td><td>UNIT VARIABLE AND ASSESSMENT GUIDE</td></tr>
<tr><td>
Element 1: Design various types of reports
1.1 Establish report standards
1.2 Manage template design and development
1.3 Develop standard text for reports
1.4 Develop strategies to ensure use of standard reports
1.5 Develop strategies for maintenance and continuous improvement of reports
Element 2: Prepare various types of reports
2.1 Develop report to specifications as required
2.2 Identify sources of data and access report data that underpins the final report objective(s)
2.3 Analyse data for inclusion in the report
2.4 Produce the reports
</td><td>
Unit Variables
The Unit Variables provide advice to interpret the scope and context of this unit of competence, allowing for differences between enterprises and workplaces. It relates to the unit as a whole and facilitates holistic assessment
This unit applies to all industry sectors that utilise written reports as a means of internal communication and business management within the labour divisions of the hotel and travel industries and may include:
1. Food and Beverage Service
2. Food Production
3. Front Office
4. Housekeeping
Standards may be related to:
• Identifying organisational requirements for information entry, storage, output and quality of report design and production
• Evaluating organisational information technology capability, currently and into the future, in terms of its effect on document design and production
</td></tr>
</table>

Element 3: Present various types of reports **3.1** *Distribute reports* according to internal requirements **3.2** *Deliver a verbal presentation* in support of the report	• Identifying the types of reports that the organisation uses or wants to use, including financial management reports, text-based reports, statistical performance-based reports and any combination of these; reports may be prepared on a daily or *ad hoc* basis, such as following a defined event, accident, or incident, or on any regular, scheduled basis • Complying with relevant legislated obligations relating to reporting and the content of reports • Complying with internal production requirements and enhancements related to organisational documentation and/or reports, including: ▪ Host enterprise templates/house style demands relating to margins, fonts and colour ▪ Language used and style of report ▪ Host enterprise policies and procedures in all areas that relate to reports ▪ Other user requirements where the report is produced to satisfy the needs of, for example, a joint venture partner, head office or a financial institution ▪ Quality standards ▪ Print quality ▪ Use of page layout software ▪ Use of recycled paper, including general, environmentally-friendly activities related to printing and all production activities, including power usage ▪ Colour photography ▪ Binding media ▪ Final report presentation ▪ Production of multiple copies ▪ Electronic and/or paper-based format.

	Template design and development will include design and structure issues such as:
	• Headers and footers
	• White space
	• Boxes
	• Page layout attributes
	• Use of logos
	1. Content
	• Performing calculations or conversions
	• Automatically opening documents
	• Assigning options to a key, or toolbar button
	• Matching the format and template to the individual; purpose, audience and information requirements
	• Ensuring readability of the final template
	• Ensuring appearance, style and layout comply with other internal reports, where applicable
	• Ensuring reports are tested/trialled and user feedback is obtained to inform report redevelopment and to generate a report template that allows maximum efficiency and optimises presentation.
	Standard text may be related to:
	• Evaluating the usefulness of complex technical software functions in automating aspects of standard document production, including:
	  ▪ Table of contents
	  ▪ Indexing
	  ▪ Importing

	▪ Exporting ▪ Linking ▪ Embedding ▪ Merge criteria ▪ Fields ▪ Form fields ▪ Formulae ▪ Sort criteria ▪ Macros ▪ Display features ▪ Data transfer • Matching software functions with report requirements to optimise production efficiency • Testing standard macros to ensure they meet individual document requirements. *Strategies to ensure use of standard reports* may include: • Preparing explanatory notes relating to: ▪ Indentations ▪ Spacing ▪ Page numbers ▪ Typeface styles ▪ Captions ▪ Bullet/number lists ▪ Indexing

	▪ Footnotes and endnotes ▪ References • Training is developed and implemented on the use of report templates, macros • Circulating, naming and storing master files and print copies of templates and macros. *Strategies for maintenance and continuous improvement of reports* should relate to: • Monitoring the use of standard templates and macros • Monitoring quality of produced reports • Checking levels of training that have been delivered • Checking level of competency achieved by staff learning templates, macros and use of report formats • Producing written documentation standards • Preparing checklists to support the written documentation standards • Evaluating reports against the criteria set out in the checklists • Comparing changing organisational needs and planned changes against current standards • Seeking feedback from nominated personnel, including end-users of the reports. *Develop report to specifications* may include: • Clarifying report objectives with relevant personnel and/or key stakeholders • Planning the final content of the report, including developing rationales for omitting certain information • Planning the format of the report, unless a standardised format exists • Matching the report to the identified report objectives.

	Sources of data may include:
	• Field work
	• Research materials
	• Published books
	• Academic reports
	• Industry reports
	• Colleagues
	• Computerised databases
	• Internet searches and specific websites
	• Newspapers and journals
	• Industry publications
	• Industry specialists and experts.
	Access report data may include:
	• Authorising release of relevant data and/or information that is commercial-in-confidence
	• Ensuring information from all available sources of data has been obtained
	• Verifying accuracy and currency of data, as far as is possible
	• Examining available data
	• Examining systems to establish data limitations
	• Identifying suitable data modelling tools, as appropriate, to extract information such as:
	  ▪ Interaction of financial data as it flows from the source to the required output
	  ▪ Any process used for testing assumptions against a variety of scenarios.

	Analyse data for inclusion may include:
	• Ensuring report data is analysed in such a way that the process meets organisational objectives and requirements, which may include:
	  ▪ Timelines
	  ▪ Policy documentation requirements
	  ▪ Verbal and written instructions given in relation to activities related to data analysis
	  ▪ Internal control guidelines
	  ▪ Computer system documentation
	• Identifying the required and most applicable format as identified by the organisation.
	
	Produce the reports may include:
	• Entering the required data into the report
	• Editing data as required
	• Using advanced functions to ensure completion of the task, which may include:
	  ▪ Creating autotext
	  ▪ Templates
	  ▪ Macros
	  ▪ Table of contents
	  ▪ Index
	  ▪ Newspaper columns
	  ▪ Glossaries
	  ▪ Scanning
	  ▪ Importing data, such as tables, graphs and charts from spreadsheets

	• Meeting designated timeline requirements, which may include: ▪ As agreed with supervisors and management ▪ Nominated organisational deadlines as specified in policies, by operational imperatives and as determined by traditional practice ▪ Deadlines negotiated with individual end-users and/or persons requesting the report • Inserting information from other files as necessary, including scanning and data importing • Checking report for spelling, grammar and numeric data • Proof reading reports for validity, reliability, accuracy of contents, consistency of layout and structure, applicable language and style • Ensuring the report accords with organisational standards relating to formatting and other standards • Ensuring the contents of the report reflect the stated objectives for the report and address the key management and operational requirements, as well as providing relevant and supporting ancillary information • Making modifications to reports on the basis of errors, omissions, or inconsistencies identified during proof reading and checking activities • Presenting report to nominated person for approval prior to final printing, where appropriate • Printing the report • Binding the report • Saving and filing the report • Making back-up copies of files and reports, as necessary and in keeping with organisational requirements.

	Distribute reports may include: • Completing and circulating reports in keeping with policy guidelines that apply • Hand delivering reports directly to nominated individuals • Placing hard copy reports into designated locations such as pigeon holes • Forwarding electronic copies of reports according to a distribution list • Observing security and confidentiality requirements • Obtaining signature to prove report has been delivered and received • Including reports with other nominated material as part of meeting and/or briefing papers • Ensuring reports are received in sufficient time to enable them to be read and digested by the user prior to a nominated meeting, or other decision making event. *Deliver a verbal presentation* may include: • Ensuring language and tone is appropriate to the audience • Providing full, or short-form, hard copies of the report at the presentation • Ensuring presentation is organised logically and is structured and balanced according to purpose, audience and context • Generating and/or acquiring physical resources for use in supplementing and/or illustrating the presentation • Adhering to industry and/or organisational standards in relation to the verbal presentation • Practicing and polishing the presentation • Ensuring sufficient numbers to make the presentation • Making the actual presentation • Soliciting and responding to questions • Following-up after the presentation in relation to questions that could not be satisfactorily answered during the presentation.

	Assessment Guide The following skills and knowledge must be assessed as part of this unit: • The enterprise's policies and procedures in regard to reports, internal documentation, presentations at meetings and security and confidentiality requirements regarding internal data, operational and performance-based information and statistics • Knowledge of any host country legislation that applies to the production of reports, where applicable • Principles of confidentiality and security in relation to internal documentation and reports • Ability to use computerised filing and storage systems, plus spreadsheets and databases as well as paper-based filing and retrieval systems • Ability to research and write reports including evaluation and analysis skills • Ability to prepare for and deliver a verbal presentation • Keyboarding skills plus the ability to proof read, edit and apply necessary skills to alter established report format and layout in accordance with required and emerging need • Literacy and numeracy skills. **Linkages To Other Units** • Access and retrieve computer-based data • Produce documents, reports and worksheets on a computer • Maintain a paper-based filing and retrieval system • Monitor and maintain a business computer system • Prepare business documents • Use common business tools and technology • Work cooperatively in a general administration environment

	• Develop and implement operational policies • Conduct a night audit • Operate a computerised reservation system • Prepare and deliver a presentation • Receive and process reservations • Source and present information • Interpret financial statements and reports. **Critical Aspects of Assessment** Evidence of the following is essential: • Understanding of host enterprise policies and procedures in regard to reports, internal documentation, presentations at meetings, security and confidentiality requirements regarding internal data, operational and performance-based information and statistics • Demonstrated ability to design, prepare and present one hard copy financially-based report that complies with industry standard requirements for a nominated situation, including the ability to make a verbal presentation to explain the written report • Demonstrated ability to design, prepare and present one hard copy performance-based report that complies with industry standard requirements for a nominated situation, including the ability to make a verbal presentation to explain the written report. **Context of Assessment** This unit may be assessed on or off the job: • Assessment should include practical demonstration either in the workplace or through a simulation activity, supported by a range of methods to assess underpinning knowledge • Assessment must relate to the individual's work area or area of responsibility.

Resource Implications

Training and assessment to include access to a real or simulated workplace; and access to workplace standards, procedures, policies, guidelines, tools and equipment.

Assessment Methods

The following methods may be used to assess competency for this unit:

- Observation of practical candidate performance
- Analysis of a portfolio of documents prepared by the candidate
- Evaluation of the presentation made to support the reports(s)
- Oral and written questions
- Third party reports completed by a supervisor
- Project and assignment work.

Key Competencies in this Unit

Level 1 = competence to undertake tasks effectively

Level 2 = competence to manage tasks

Level 3 = competence to use concepts for evaluating

Key Competencies	Level	Examples
Collecting, organising and analysing information	3	Evaluate captured data to determine inclusion in the report
Communicating ideas and information	3	Discuss end-user needs with colleagues and management
Planning and organising activities	3	Arrange activities to ensure final report meets identified timelines

	Working with others and in teams	3	Liaise with colleagues to capture required data
	Using mathematical ideas and techniques	3	Manipulate data to achieve the objectives of the report
	Solving problems	3	Revise data to eliminate errors identified by proof reading and checking
	Using technology	3	Use software programs to manipulate data

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Design, prepare and present various types of reports D1.HGE.CL7.01 D1.HGA.CL6.08
Instructions	1. Ask student questions from the attached list to confirm knowledge, as necessary 2. Place tick in boxes to reflect student achievement (Pass Competent 'PC' or Not Yet Competent 'NYC') 3. Write short-form student answer in the space provided for each question.

Questions	**Response**	
	PC	**NYC**
1. What standards have you established for reports in your workplace?	❑	❑
2. Describe the template for a report that you have developed and explain the reasons for its final design.	❑	❑

Questions	Response	
	PC	NYC
3. Name a report you prepare and identify the standard text and content for that report.	❑	❑
4. What strategies and techniques do you apply to ensure reports can be used as intended by those who receive the reports?	❑	❑
5. What strategies do you use to encourage continuous improvements (feedback from others) to workplace reports you are involved with?	❑	❑

Questions	Response	
	PC	NYC
6. Identify one report you prepare in your workplace and explain the specifications which apply to its production.	❑	❑
7. For the report identified in your answer to the previous question, what sources of information do you use or access in order to generate the final report?	❑	❑
8. What factors do you take into consideration when analysing source data for inclusion into a report?	❑	❑

Questions	Response	
	PC	NYC
9. Identify a report you prepare and describe the activities involved in physically creating the final report after appropriate preparation and analysis activities have been completed.	❑	❑
10. What internal enterprise requirements apply to the distribution of reports in your workplace?	❑	❑
11. Describe an instance when you were required to give a verbal presentation to support or explain a report: what was the report, what did you do and say?	❑	❑

Written Questions

Design, prepare and present various types of reports – D1.HGE.CL7.01 D1.HGA.CL6.08

Student Name: ______________________________

Answer all the following questions and submit to your Trainer.

1. Explain the importance of effective communication in the hospitality and tourism industry.

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2. List and describe the three categories of communication.

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3. Explain two key considerations when evaluating organisational requirements for report standards.

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4. List and describe two internal and two external influences on report standards.

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5. What is a report template?

6. You have been asked to write a plan for a report on the performance of a specific product or service offered by a business. Explain the procedure you could follow to design the structure of the report.

7. For the same report as Question 6, list three considerations you will give to content.

8. Using the same report as Question 6, describe three standard text functions you might use in the report template and how they will assist with report preparation.

9. Explain two ways that macros can be used in a report template.

10. How is feedback on the development of report templates obtained from users? List two methods for documenting any feedback.

11. Explain the steps required to implement a staff training program when a new report template is developed.

12. List and describe three report objectives that are relevant for reports produced in the hospitality and tourism industry.

13. Describe two requirements that influence the development of report objectives.

14. What are the issues to consider surrounding report content when planning the report?

15. What is meant by data collection methodology?

16. Describe two styles of report that a business may choose to effectively communicate information or data.

17. What are two resources you can use to find the sources of data to include in a report?

18. List and describe at least three guidelines that apply to the quality of data that may be sourced for a report.

19. Describe one method that may be needed to access internal data and one method that may be required to access external data.

20. Choose two different external data sources that are relevant to the hospitality and tourism industry and describe the information each source provides.

21. Define primary and secondary data and explain why it is necessary to appreciate the difference.

22. Explain two internal guidelines that specify how data should be analysed.

23. List the steps required to effectively use a mind map to analyse data.

24. Describe the purpose of a draft report.

25. Briefly explain the six steps to the edit process.

26. Explain why security and confidentiality is important when distributing reports.

27. Choose two reports that could be presented orally and describe why an oral presentation might be appropriate.

28. For the same two reports, list two presentation aids, strategies or techniques for each report that best suit the purpose for the presentation.

29. List three tips for delivering an effective presentation.

Answers to Written Questions

Design, prepare and present various types of reports – D1.HGE.CL7.01 D1.HGA.CL6.08

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

1. Explain the importance of effective communication in the hospitality and tourism industry.

Much of the day in a hospitality and tourism organisation involves communicating, in one form or another with other people. It is therefore very important that the ability to communicate effectively and continually develop these skills is a key part of hospitality and tourism organisations. It is through effective communication that the business can succeed and achieve its goals and objectives.

2. List and describe the three categories of communication.

- Verbal communication is in the form of words, either written or spoken
- Non-verbal communication, sometimes called body language, includes gestures, facial expressions and tone of voice
- Graphic communication takes the form of images to describe ideas, relationships or connections.

3. Explain two key considerations when evaluating organisational requirements for report standards.

Any of the following:

- User needs
- Time periods
- The content is understood by the user
- Budgetary considerations.

4. List and describe two internal and two external influences on report standards.

Any of the following:

- Document structure and layout
- Standard elements such as headings, dates, report names
- Font and formatting options
- Language used and style of report
- Electronic and/or hard copy format
- Print features including colour or black and white
- Print quality
- Environmentally-friendly options related to paper and energy usage
- External parties can specify the names of reports that are to be distributed externally such as financial statements. Document standards need to ensure appropriate terminology is used
- Non-discriminatory language should be used
- Distribution requirements.

5. What is a report template?

A report template is a tool that enforces a pre-set or pre-developed layout in electronic or paper format that is used to make new pages with a similar design, style or pattern. Templates are designed with reference to report standards to ensure that the purpose of the report is met; the audience can understand the report and the information requirements are met.

6. You have been asked to write a plan for a report on the performance of a specific product or service offered by a business. Explain a procedure you could follow to design the structure of the report.

Responses should include the following points:

- Headings
- Access
- Typography
- Spacing.

7. For the same report as Question 6, list three considerations you will give to content.

Any of the following:

- Order of information
- Plain language statements
- Common words and phrases
- Automated text functions.

8. Using the same report as Question 6, describe three standard text functions you might use in the report template and how they will assist with report preparation.

Any of the following:

Function	Purpose
Table of contents	Directs the user of the report to the location of particular information within the report. This can be created in the report template from an automated function within the software.
Indexing	The report template can be created with a list of key words or phrases that are associated with the report for users to choose from when the report is prepared. This maintains consistency across all reports that use this function.
Importing	This feature allows data that needs to be included in the final report to be accessed from a source external to the report template without the user having to key or type in the information. The report template will define the parameters or rules for importing and users of the report will usually choose a keystroke or macro to perform the function.
Exporting	Data is exported from a report for use with another application or because the users of the report require a different file format. Sometimes this is a data security issue, as often the new format cannot be altered by the normal use of software.
Linking	The linking function has slightly different interpretations depending on the software application. Essentially though it is a group of words or the contents of a field or cell that refer to information from another information source. The information is linked so that changes to the original information will update the linked source. Report templates will utilise this function to save data entry.
Embedding	Embedding is similar to linking data but instead of multiple data sources storing the information separately, this function allows for just one data source to be maintained in the report template. This can streamline a report template as users of the template can use the functionality in one software application from another application.
Merge criteria	Some reports require data to be merged or combined from different sources. A report template can set these criteria and the users can activate it where necessary.

Function	Purpose
Fields	For word processing applications, fields indicate data that needs to be changed in an otherwise standard document. In database and spreadsheet software, fields are records or collections of data that are the same or similar. Their use in a report template improves the efficiency of report preparation as users focus on the data that needs to be changed or can access collections of similar data promptly.
Form fields	Form fields allow for particular pre-defined information to be included in the field of a report template. This might be a check box or a drop down menu with a limited number of options. This allows control over the report content where appropriate.
Formulae	Formulae or standard calculations are often set in financial report templates so that the user does not need to perform the function each and every time the report is created, thereby maximising efficiency. Formulae are used most frequently in spreadsheet and database applications.
Sort criteria	Sort criteria determine the order in which information is displayed in a report. For example, information may be displayed alphabetically, numerical sequence or date order. The report template will use an automated function to ensure that the appropriate criteria is applied.
Styles	Styles refer to the way text is presented in a report. Any number of styles can be set for a report template and often a drop down box will feature in the toolbar. This ensures consistency is maintained across all reports that are prepared.
Inserting graphics	Where appropriate, the report template can specify the type of graphics that can be used and even the source of the information as necessary.

9. Explain two ways that macros can be used in a report template.

Any of the following or any from the table in Question 8:

- Open and close the template
- Import data
- Export data
- Link data
- Save the template
- Perform calculations.

10. How is feedback on the development of report templates obtained from users? List two methods for documenting any feedback.

Any of the following:

- Testing the template functions
- Testing the procedure guide
- Software assisted functions such as highlight and track changes
- Routing documents
- Version control
- Staff training programs.

11. Explain the steps required to implement a staff training program when a new report template is developed.

To implement a staff training program, the following procedures are followed:

- Assess current staff skill levels
- Compare to skills required to use the report template
- Devise a training program to address any gap in skills.

12. List and describe three report objectives that are relevant for reports produced in the hospitality and tourism industry.

Any of the following:

- Monitor the financial performance of a department, section of the business, product or service or the entire business
- Review other performance indicators such as occupancy, market share and other statistical analysis
- Review and compare incidents or events that are required to be reported by government bodies such as workplace accidents
- Evaluate the information and make decisions regarding future activities, events or other matters that are considered necessary for the future success of the business.

13. Describe two requirements that influence the development of report objectives.

Any of the following:

- Internal requirements such as monitor performance
- Timelines or set time periods for which the report is prepared
- External requirements relating to format or time set by relevant bodies.

14. What are the issues to consider surrounding report content when planning the report?

Any of the following:

- Providing information such as the range of products and services offered compared to competitors
- Operational data such as occupancy, guest ratios, food cost ratios
- Financial performance
- Monitoring and evaluating the performance of particular products or services such as a new tour or perhaps a revision to in-house services such as complementary transport
- Investigating problems or situations arising from activities or events
- Preparing data to management to introduce a change to current operations
- Future financial, marketing and other predictions
- Quality reports
- Background information
- Data collection methods
- Sources of data.

15. What is meant by data collection methodology?

Data collection methodology is the rationale applied to the nature and scope of information a report will contain.

16. Describe two styles of report that a business may choose to effectively communicate information or data.

Any of the following:

- Informative – this describes or informs
- Persuasive – when a report needs to argue, propose or persuade users
- Investigative – the report researchers or investigates an issue or range of issues
- Analytical – report objective is to offer a solution to problems or present problems to be resolved.

17. What are two resources you can use to find the sources of data to include in a report?

Any of the following:

- Policies and procedures
- Data control functions in a report template
- Automated data retrieval sources.

18. List and describe at least three guidelines that apply to the quality of data that may be sourced for a report.

Any of the following:

- Validity
- Currency
- Reliability
- Accuracy
- Consistency
- Language styles.

19. Describe one method that may be needed to access internal data and one method that may be required to access external data.

Any of the following:

Internal data:

- Password restrictions
- Secure manual storage.

External data:

- Subscriptions
- Fees or charges
- Registration with no charge
- Automated distribution lists.

20. Choose two different external data sources that are relevant to the hospitality and tourism industry and describe the information each source provides.

Any of the following:

- Newspaper articles
- Books
- Journals
- Associations and bodies
- Global and regional forums
- Report findings
- Academic reports
- Published reports from other industry related organisations.

21. Define primary and secondary data and explain why it is necessary to appreciate the difference.

Primary data is all data that is retrieved from the information system of the organisation. Data sourced externally is always considered to be a secondary data source.

Secondary data has already been manipulated so it is necessary to understand or determine the methods, processes or assumptions underlying the manipulation so that the data can be interpreted and presented appropriately

22. Explain two internal guidelines that specify how data should be analysed.

Any of the following:

- Policies and procedure documentation
- Timelines
- Information system documentation
- Formats.

23. List the steps required to effectively use a mind map to analyse data.

- Identify the central concept or idea
- Note concepts from the source data, one a time, around the central idea
- As data becomes more specific, it is noted and linked to each source concepts
- Drawing lines to related information or to where relationships are evident makes links.

24. Describe the purpose of a draft report.

The purpose for the draft report is to capture all the data that is to be included in the report in the style and format that is required so that at least the basic form and content are evident. The report can then be reviewed as a final product.

25. Briefly explain the six steps to the edit process.

Answers should cover the following with appropriate explanations:

- Edit
- Correct
- Check purpose
- Check objectivity
- Remove unnecessary information
- Check format.

26. Explain why security and confidentiality is important when distributing reports.

Some reports contain confidential and sensitive information that could be used for illegal or immoral purposes should it fall into the hands of the wrong parties. To prevent this, there are often laws governing how sensitive information must be treated by a business. Care must be taken to ensure that reports are only available to authorised personnel or users.

27. Choose two reports that could be presented orally and describe why an oral presentation might be appropriate.

Any of the following reports:

- Tenders
- Proposals
- Information about new products or services
- Explanations for financial and other operational performance
- New or revised marketing strategies
- Introduction of new policies and procedures
- Updates on local, regional and global factors that may affect the organisation.

Reasons for an oral presentation include:

- Internal requirements
- Clarify report objectives
- Encourage discussions and opinions
- Demonstration of a concept is more appropriate than written description
- Feedback.

28. For the same two reports, list two presentation aids, strategies or techniques for each report that best suit the purpose for the presentation.

Any of the following strategies:

- Case studies
- Demonstrations
- Audience participation
- Simulations.

Any of the following techniques:

- Music
- Animations
- Incorporating logos
- Use of colour and black and white.

Any of the following visual aids

- Software applications where slides can be created and displayed on computer screens.
- Whiteboards
- Flipboard sketches
- Models
- Maps
- Charts
- DVDs and videos
- Internet content
- Handouts
- Full or short copies of the presentation.

29. List three tips for delivering an effective presentation.

Any of the following:

- A well prepared presentation almost always results in a successful delivery
- Arrive early to set up any presentation aids and ensure technology that may be required is in working order
- Review your plan and notes
- Language and tone must be appropriate for the audience
- Monitor the responses of the audience and respond appropriately
- Interact with the audience
- Ask questions of the audience to clarify understanding
- Stay within the time limit given.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Design, prepare and present various types of reports D1.HGE.CL7.01 D1.HGA.CL6.08
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Design various types of reports b) Prepare various types of reports c) Present various types of reports 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Design various types of reports		
Establish report standards	❑	❑
Manage template design and development	❑	❑
Develop standard text for reports	❑	❑
Develop strategies to ensure use of standard reports	❑	❑
Develop strategies for maintenance and continuous improvement of reports	❑	❑
Element 2: Prepare various types of reports		
Develop report to specifications as required	❑	❑
Identify sources of data and access report data that underpins the final report objective(s)	❑	❑
Analyse data for inclusion in the report	❑	❑
Produce the reports	❑	❑

Did the candidate	Yes	No
Element 3: Present various types of reports		
Distribute reports according to internal requirements	❑	❑
Deliver a verbal presentation in support of the report	❑	❑
Did the student's overall performance meet the standard?	❑	❑

Feedback to student and trainer/assessor
Strengths:
Improvements needed:
General comments:

Candidate signature		**Date**	
Assessor signature		**Date**	

Third Party Statement

Student name:			
Name of third party:		**Contact no**	
Relationship to student:	❑ Employer ❑ Supervisor ❑ Colleague ❑ Other *Please specify:*____ *Please do not complete the form if you are a relative, close friend or have a conflict of interest]*		
Unit of competency:	Design, prepare and present various types of reports D1.HGE.CL7.01 D1.HGA.CL6.08		

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

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

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Establishes report standards and manages template design and development	❑	❑	❑
Develops standard text for reports	❑	❑	❑
Develops strategies for use of standard reports and maintenance and continuous improvement of reports	❑	❑	❑
Identifies, accesses and analyses data for inclusion in reports	❑	❑	❑
Develops, produces and distributes reports as required	❑	❑	❑
Supports provision of reports through verbal presentations	❑	❑	❑

Comments/feedback from Third Party to Trainer/Assessor:	
Third party signature:	**Date:**
Send to:	

Competency Recording Sheet

Name of Student		
Name of Assessor/s		
Unit of Competency	Design, prepare and present various types of reports	D1.HGE.CL7.01 D1.HGA.CL6.08
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

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

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Design various types of reports						
Establish report standards						
Manage template design and development						
Develop standard text for reports						
Develop strategies to ensure use of standard reports						
Develop strategies for maintenance and continuous improvement of reports						
Element 2: Prepare various types of reports						
Develop report to specifications as required						
Identify sources of data and access report data that underpins the final report objective(s)						
Analyse data for inclusion in the report						
Produce the reports						
Element 3: Present various types of reports						
Distribute reports according to internal requirements						
Deliver a verbal presentation in support of the report						
Candidate signature			**Date**			
Assessor signature			**Date**			

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