

UNIT TITLE: DESIGN, PREPARE AND PRESENT VARIOUS TYPES OF REPORTS		NOMINAL HOURS: 25
UNIT NUMBER: D1.HGE.CL7.01 D1.HGA.CL6.08		
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to develop, produce and present a range of reports used by the hotel industry		
ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE	
<p>Element 1: Design various types of reports</p> <p>1.1 Establish report <i>standards</i></p> <p>1.2 Manage <i>template design and development</i></p> <p>1.3 Develop <i>standard text</i> for reports</p> <p>1.4 Develop <i>strategies to ensure use of standard reports</i></p> <p>1.5 Develop <i>strategies for maintenance and continuous improvement of reports</i></p> <p>Element 2: Prepare various types of reports</p> <p>2.1 <i>Develop report to specifications</i> as required</p> <p>2.2 Identify <i>sources of data</i> and <i>access report data</i> that underpins the final report objective(s)</p> <p>2.3 <i>Analyse data for inclusion</i> in the report</p> <p>2.4 <i>Produce the reports</i></p> <p>Element 3: Present various types of reports</p> <p>3.1 <i>Distribute reports</i> according to internal requirements</p> <p>3.2 <i>Deliver a verbal presentation</i> in support of the report</p>	<p>Unit Variables</p> <p>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</p> <p>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:</p> <ol style="list-style-type: none"> 1. Food and Beverage Service 2. Food Production 3. Front Office 4. Housekeeping <p><i>Standards</i> may be related to:</p> <ul style="list-style-type: none"> • 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 • 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 <i>ad hoc</i> 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
- 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