Organise functions

D1.HSM.CL5.01
D1.HCS.CL6.04

Assessor Manual

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

Organise functions

D1.HSM.CL5.01
D1.HCS.CL6.04

Assessor Manual

Project Base

William Angliss Institute of TAFE
555 La Trobe Street
Melbourne 3000 Victoria
Telephone: (03) 9606 2111
Facsimile: (03) 9670 1330

Acknowledgements

Project Director:	Wayne Crosbie
Chief Writer:	Alan Hickman
Subject Writers:	Alan Hickman, Nick Hyland
Project Manager/Editor:	Alan Maguire
DTP/Production:	Daniel Chee, Mai Vu, Kaly Quach

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

The ASEAN Secretariat is based in Jakarta, Indonesia.

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

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

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

Disclaimer

Every effort has been made to ensure that this publication is free from errors or omissions. However, you should conduct your own enquiries and seek professional advice before relying on any fact, statement or matter contained in this book. The ASEAN Secretariat and William Angliss Institute of TAFE are not responsible for any injury, loss or damage as a result of material included or omitted from this course. Information in this module is current at the time of publication. Time of publication is indicated in the date stamp at the bottom of each page.

File name: AM_organise_functions_refined

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
- 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.		

	Tick (✓)	Remarks
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

UNIT TITLE: ORGANISE FUNCTIONS	NOMINAL HOURS: 45
UNIT NUMBER: D1.HSM.CL5.01 D1.HCS.CL6.04	
UNIT DESCRIPTOR: This unit deals with skills and knowledge required to organise functions, and to follow-up with customers after the function. It does not cover the delivery of services for the function itself	

ELEMENTS AND PERFORMANCE CRITERIA	UNIT VARIABLE AND ASSESSMENT GUIDE
Element 1: Identify function facilities and procedures at the host establishment **1.1** Explain the *role of the Functions Booking book* **1.2** Identify the *facilities available* for functions **1.3** Identify the *styles of functions* that can be accommodated **1.4** Identify the *styles of service* available **1.5** Describe the *function set-up options* available **1.6** Describe the *function menus* available **1.7** Identify *function costs* for the customer ***1.8*** Develop a *function kit* **1.9** Identify the role of *function-related documentation*	**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 organising for functions and following-up with the customer within the labour divisions of the hotel and travel industries and may include: 1. Front Office 2. Housekeeping 3. Food and Beverage Service 4. Food Production *Role of the Functions Booking book* is related to: • Recording details of functions that have been booked by: ▪ Customer name and contact details ▪ Day, date and time ▪ Description of function

Element 2: Liaise with function customers **2.1** Determine *customer needs* **2.2** *Identify date and time of function* **2.3** *Match establishment resources to identified need* for function **2.4** Provide *advice and assistance* in relation to the function **2.5** *Record function requirements* as agreed by customer **2.6** *Confirm function booking* with customer **2.7** *Obtain deposit for function* **Element 3: Prepare for functions** ***3.1*** *Maintain and update Function Sheet* **3.2** *Advise colleagues and staff* in relation to function **3.3** *Roster staff* for function **3.4** Minimise *impact of function on normal establishment operation* **3.5** *Arrange for external services* as identified **3.6** Purchase *necessary stock* for function **3.7** *Prepare Running Sheet* for function **3.8** Conduct *pre-function briefings* **3.9** *Finalise function details* with customer, colleagues and staff	▪ Room/location to be used ▪ Approximate numbers attending. *Facilities available* may include: • Meeting/conference room • Stand up conference areas • Banquet room • Exhibition bays and space • Business centres • Auditoriums • Press rooms • Storage bays • Parking facilities • Change rooms • Display areas • Dedicated function room/s • Designated and discreet sections of restaurants and/or bars • Food and beverage service • Accommodation • Sound and lighting • Communication technologies and equipment. *Styles of functions* may include: • Breakfasts

3.10 *Monitor set-up* for the function **3.11** *Monitor service delivery* of function **Element 4: Follow-up after functions** ***4.1*** *Obtain feedback from customer* **4.2** *Obtain payment* for function **4.3** *De-brief staff*	• Lunches • Dinners • Cocktail parties • Seminars, workshops, conferences • Weddings • Anniversaries • 21st birthday parties • Product launches and distributor functions • School formal, annual dinners and dinner dances • Annual general meetings • Training seminars • Graduations and award nights • Trade shows/exhibitions • Press receptions • Fashion shows • Special events • Stage shows and productions • Formal, informal or semi-formal. *Styles of service* may include: • Plated service • Silver service • Semi-silver service • Buffet service • Stand up finger food.

	Function set-up options may include: • Theatre style • E-shaped • Boardroom style • Sit down at individual tables • Classroom style. *Function menus* may include: • Different styles of functions and timing of functions • A variety of price points • Inclusive and non-inclusive menus • Type of service required – including plated service, silver service, semi-plated service, stand-up finger food, buffet • A la carte, table d'hôte or set menu options. *Function costs* may include: • Room and facility hire • Food and beverage – including 'on arrival' and during function as well as refreshments • Decorations • Specialist staff as required depending on the nature of the function – including translators, technical it and lighting experts, security • Bands and entertainers • Accommodation • Special requests.

	Function kit may include: • Details and information in relation to venue size, capacity of rooms and rooms/areas available • Details and information in relation to alternative seating/table arrangements • Details and information in relation to venue facilities, services and equipment - including a range of items that can be hired for specific functions • Sample menus for various dining styles at a range of selling prices/price points • Sample drink lists featuring alcoholic and non-alcoholic drinks priced by the bottle and by the glass • Suggested staffing levels for functions of various numbers, and of various styles and types • Colour photographs of different room set-ups and functions in progress • Contact details of the venue • A DVD of the venue with a focus on functions. *Function-related documentation* may include: • Functions' sheets – also known as Event Order and Function Order • Order forms • Post-function reports • Function kits • Running sheet • Staff time sheets • Seating plans • Function file • Function confirmation forms/letters

	• Customer feedback form • Customer account • Request for deposit and payment forms • Receipts. *Customer needs* may include: • A specific day and date • Style and format of function –see above • Location – including interior and exterior requirements, and nominated rooms/areas • Timing and duration considerations – including access times for customer to prepare/set up as they wish, arrival times for guests, service times, speeches and presentations, cessation of service, guest departure • Food and beverages, accommodation and entertainment • Specialist technology services • Ancillary services and rooms – including security, technical staff, and translators • Guest numbers • Privacy • Budget. *Identify date and time of function* may include: • Checking availability in Functions Booking book • Assessing the potential for moving existing bookings to a different location/room and/or date.

	Match establishment resources to identified need may include: • Describing function facilities and options available • Giving function kit to customer and explaining the contents • Providing guided tour of premises and facilities to customer • Advising customer in relation to details of the provision of similar functions. *Advice and assistance* may include: • Accepting and confirming requests made by customer • Recommending food and beverage options – including presenting standard function menus and substitutions that can be made within those menus • Recommending service styles, room layouts, timing considerations, entertainment options and ancillary services appropriate to the function type • Involving in-house specialist – including chefs, housekeeping, and security as appropriate. *Record function requirements* may include: • Establishing Function Sheet • Making provisional booking as stated by customer in the Functions Bookings book. *Confirm function booking* may include: • Maintaining on-going contact with customer – including follow-up meetings to view facilities, make selections from available options, meet with staff and instil confidence in the ability and professionalism of the establishment • Up-dating customer on issues to be resolved or finalised by the establishment • Finalising numbers for the function • Sending copy of function sheet to customer and receiving confirmation of details contained on same • Writing function in the functions booking book.

	Obtain deposit for function may include: • requesting deposit payment based on standard establishment requirements such as percentage of estimated or quoted final cost • Setting date for payment of deposit • Advising of payment options • Issuing receipt for deposit • Recording payment of deposit on internal documentation • Advising customer of amount outstanding. *Maintain and update Function Sheet* may include: • Amending Function File on the basis of requests from customer – including finalisation of menus and beverages, confirmation of times, and adding new requests for products and services • Adding details to the file regarding function-related activities – including booking of entertainers, confirmation of external services to be provided, and timing of service • Discussing updates and changes with colleagues and staff. *Advise colleagues and staff* may include: • Updating them about preparations and purchases • Assisting them to meet function requirements. *Roster staff* may include: • Calculating staff required and hours to be worked • Costing labour for the function • Selecting experienced and competent staff • Training staff, as required.

	Impact of function on normal establishment operation may include: • Problems caused by noise • Disruption to normal service caused by closure of room/areas • Reduced level of service in other areas occasioned by staff working on the function • Restricted access to the venue • Reduced availability of parking for regular customers • Higher volume of patrons on the premises • Increased possibility of drunkenness and other anti-social behaviour. *Arrange for external services* may include: • Sourcing options • Liaising with providers to identify and cost necessary items and services • Facilitating access by external providers to venue to enable on-site assessment of requirements, facilities and demands • Connecting service providers with customer, where appropriate. *Necessary stock* may include: • Food and beverages to match identified menu selections • Decorations – including flowers, table decorations and displays, stage decorations, bunting and other decorations as requested by customer • Linen • Crockery and glassware.

	Prepare Running Sheet may include: • Finalising function details in conjunction with customer such as times for: ▪ Guest arrival ▪ Pre-dinner drinks ▪ Seated for dinner ▪ Entree ▪ Speech and presentation ▪ Main course ▪ Entertainment ▪ Dessert/coffee ▪ Departure • Disseminating and explaining Running Sheet to colleagues and staff. *Pre-function briefings* may include: • Identifying customer and attendees to staff • Describing anticipated/planned function – including distribution of running sheets and discussing the importance of timing requirements • Identifying options that exist for service recovery where service timing points are exceeded • Explaining special customer requests • Notifying staff in relation to specific prohibitions during the function – which may include a ban on smoking, eating, drinking, seeking autographs, staring at guests • Completing timesheets • Allocating roles and responsibilities • Allocating stations to waiting staff and explaining seating plan • Checking uniforms and personal presentation of staff.

	Finalise function details may include: • Meeting with the customer • Accommodating last-minute changes as requested by customer, where possible • Obtaining additional deposit, if applicable • Confirming amended details as set out in Function Sheet. *Monitor set-up* may include: • Ensuring set-up complies with identified customer requirements • Facilitating access to function area by customer to undertake their own decoration • Facilitating access to function area by external providers to set-up their equipment • Taking action to address problems arising – including bringing in extra staff, re-allocation of duties, and obtaining items identified as necessary at short notice. *Monitor service delivery* may include: • Checking running times • Adjusting service delivery to align with running sheet • Ensuring quality service delivery • Ensuring all customer requirements are met • Liaising with customer during function to check level of satisfaction • Enquiring if customer has additional requirements during service • Taking action to address service problems. *Obtain feedback from customer* may include: • Requesting customer to complete a feedback form • Meeting with customer to assess level of satisfaction with function

	• Identifying areas of the function that failed to meet customer expectations • Seeking opportunities to provide further function services to customer. *Obtain payment* may include: • Confirming delivery of services as quoted with customer • Issuing account for services rendered • Processing payment • Issuing receipt and 'thank you' letter • Completing internal documentation as evidence of payment. *De-brief staff* may include: • Identifying problem areas for future attention • Determining staff who will work on future functions • Seeking general feedback on opportunities for improving delivery of future functions • Completing post-function report. **Assessment Guide** The following skills and knowledge must be assessed as part of this unit: • Ability to comply with the enterprise's policies and procedures in regard to functions, payment of deposits and conduct of guests at functions • Ability to apply principles of planning and coordination • Organisational ability • Using interpersonal and negotiation skills • Ability to use costing techniques • Ability to use the layout and facilities available within the establishment

	• Ability to understand items, services and equipment that can be out-sourced for the function • Ability to respond effectively to problems arising during the course of a function. **Linkages To Other Units** • Communicate on the telephone • Receive and resolve customer complaints • Work effectively with colleagues and customers • Work in a socially diverse environment • Develop and maintain food & beverage product knowledge • Manage responsible service of alcohol • Provide advice to patrons on food and beverage services • Establish and maintain a business relationship • Maintain quality customer/guest service • Manage financial performance within a budget • Manage special events • Manage intoxicated persons • Source and present information • Promote products and services to customers. **Critical Aspects of Assessment** Evidence of the following is essential: • Demonstrated ability to develop a function kit for the host employer • Demonstrated ability to meet with a customer to identify requirements for a nominated function

	• Demonstrated ability to generate and maintain a function file for a nominated function • Demonstrated ability to finalise requirements with a customer for a nominated function • Demonstrated ability to liaise and communicate with stakeholders to advise them of roles, responsibilities and requirements for a nominated function and arrange required internal and external resources and service to support function delivery • Demonstrated ability to roster staff for a nominated function within given labour budget parameters • Demonstrated ability to conduct a staff briefing session for a nominated function • Demonstrated ability to oversee the effective and successful set-up and operation of a nominated function • Demonstrated ability to perform post-function activities as required by the host employer. **Context of Assessment** Assessment must ensure: • Actual or simulated workplace environment for the application of activities to organise an actual function. **Resource Implications** Training and assessment must include use of real functions, products, resources, facilities, food and beverages, services and products to support the delivery of a real-life function. **Assessment Methods** The following methods may be used to assess competency for this unit: • Observation of practical candidate performance • 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	Identifying customer needs; collating information on external services to support function delivery
Communicating ideas and information	3	Sharing function information with staff and external providers
Planning and organising activities	3	Determining functions' details and allocating responsibilities for work
Working with others and in teams	3	Liaising with internal and external staff for function delivery as required
Using mathematical ideas and techniques	3	Calculating function quantities, staffing levels, costs and prices
Solving problems	3	Addressing issues arising during planning, set-up and service delivery
Using technology	1	Operating booking systems; assisting in readying IT services

Oral Questions

Student name	
Assessor name	
Location/venue	
Unit of competency	Organise functions D1.HSM.CL5.01 D1.HCS.CL6.04
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 is the role of the Functions Booking book?	❑	❑
2. What different facilities are available for functions?	❑	❑

Questions	Response	
	PC	NYC
3. What are the different styles of functions available?	❑	❑
4. What are the different styles of service available?	❑	❑
5. What are four different function set-up options available?	❑	❑

Questions	Response	
	PC	NYC
6. Describe three different menu options with examples within each option.	❑	❑
7. What are three different functions costs?	❑	❑
8. What information is included in a Function Kit?	❑	❑

Questions	Response	
	PC	NYC
9. What types of function-related documentation are used?	❑	❑
10. How can you identify customer needs in relation to a function?	❑	❑
11. What are five different types of customer needs or requirements in relation to a function?	❑	❑

Questions	Response	
	PC	NYC
12. How can you match establishment resources to identified need for a function?	❑	❑
13. How can you provide advice and assistance to clients in relation to a function?	❑	❑
14. Why is it important to record client requests?	❑	❑

Questions	Response	
	PC	NYC
15. What steps are associated with confirming a function with the client?	❑	❑
16. What steps are associated with obtaining a deposit for a function?	❑	❑
17. How can you maintain and update the Function Sheet?	❑	❑

Questions	Response	
	PC	NYC
18. How can you advise colleagues and staff in relation to a function?	❑	❑
19. Why is accurate rostering important when staffing a roster?	❑	❑
20. What are common impacts on or due to a function?	❑	❑

Questions	Response	
	PC	NYC
21. When would external suppliers be used in a function?	❑	❑
22. What are examples of stock items used in a wedding?	❑	❑
23. What is a Running Sheet and why is it important?	❑	❑

Questions	Response	
	PC	NYC
24. When are pre-function briefings held and who commonly attends these?	❑	❑
25. What items need to be finalised with a client before a function?	❑	❑
26. How can you monitor the set up of an event?	❑	❑

Questions	Response	
	PC	NYC
27. Why is it important to monitor the service delivery of a function?	❑	❑
28. Why is it important to obtain feedback from customers?	❑	❑
29. What are the steps associated with obtaining payment for a function?	❑	❑

Questions	Response	
	PC	NYC
30. Why is it important to debrief staff and who would attend this meeting?	❑	❑

Written Questions

Organise functions – D1.HSM.CL5.01 D1.HCS.CL6.04

Student Name: ____

Answer all the following questions and submit to your Trainer.

1. What information is normally kept in a Functions Booking book?

 ____

 ____

 ____

 ____

2. What are the range of facilities that are available for functions?

 ____

 ____

 ____

 ____

3. What are the different styles of functions that are available?

 ____

 ____

 ____

 ____

4. What are the benefits of buffet service in a function?

 ____

 ____

 ____

 ____

5. What are different set up options for meetings?

6. What are common items that may be served for morning or afternoon teas?

7. What are different types of function costs?

8. What is included in a Function Kit?

9. What are different types of financial and operational documents that need to be prepared in relation to a function?

10. What types of information does a function manager need to collect when meeting with the client?

____

____

____

____

11. If a client is organising a meeting function over three days what are some questions that you could ask in relation to catering?

____

____

____

____

12. Why is it important to conduct a tour of the facilities for a client in the initial meeting?

____

____

____

____

13. When would it be a good time to provide assistance and advice to the client?

____

____

____

____

14. Why is it important to repeat information that you have recorded back to the client during the initial meeting?

____

____

____

____

15. What are some points to remember when preparing quotation and costings for the client?

16. What are different payment options available to function clients?

17. What information is normally included in a Function Sheet?

18. What different departments in the hotel would you need advice or assistance from when planning a function? What information can they provide?

19. What are some considerations when trying to get the right 'mix of staff'?

20. Having a shortage of staff is common for a function. What can you do to resolve this problem or minimise its impact?

____

21. What are different types of external providers that can be used to assist a function?

22. A purchase order is often required when ordering stock. What information needs to be included in a purchase order?

23. What is recorded in a Running Sheet?

24. What are some topics for discussion in a pre-event briefing?

25. What is the purpose of receiving final confirmation with the customer before an event?

26. What are some mise-en-place activities that would be performed by food floor staff when setting up for a function?

27. What are some things would you need to focus on when monitoring a function in operation?

28. Collecting feedback about a function is important. Who can you receive feedback from?

29. What are some administration documents and activities to be performed at the conclusion of a function?

30. What is discussed in an event debrief?

Answers to Written Questions

Organise functions – D1.HSM.CL5.01 D1.HCS.CL6.04

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

1. What information is normally kept in a Functions Booking book?

- Customer name and contact details
- Day, date and time
- Description of function
- Room/location to be used
- Approximate numbers attending.

2. What are the range of facilities that are available for functions?

- Meeting/conference rooms
- Stand up conference areas
- Banquet room
- Exhibition bays and space
- Business centres
- Auditoriums
- Press rooms
- Storage bays
- Parking facilities
- Change rooms
- Display areas
- Designated and discreet sections of restaurants and/or bars
- Food and beverage service
- Accommodation
- Sound and lighting
- Communication technologies and equipment
- Sound and music facilities
- Gardens.

3. What are the different styles of functions that are available?

- Breakfasts
- Lunches
- Dinners
- Seminars, workshops and conferences
- Cocktail parties
- General parties – birthdays, celebrations of various sorts
- Weddings/receptions
- Anniversaries
- 21st birthday parties
- Product launches and distributor functions
- School formal, annual dinners and dinner dances
- Annual general meetings
- Training seminars
- Graduations and award nights
- Press receptions
- Fashion shows
- Special events
- Tradeshows
- Stage productions, including music events.

4. What are the benefits of buffet service in a function?

- Customers have greater choice
- They can have small amounts of different items as opposed to having one type of food
- Service is very time efficient
- Labour demands are reduced
- Food can be prepared in advance.

5. What are different set up options for meetings?

- Theatre style Boardroom style
- Hollow square
- Classroom style Banquet style
- U Shape
- E-shape.

6. What are common items that may be served for morning or afternoon teas?

- Selection of pastries and bakery items
- Selection of open or closed sandwiches
- Selection of biscuits and cake
- Selection of petit fours
- Beverage items – coffee, tea, juice, water, aerated waters.

7. What are different types of function costs?

- Room and facility hire
- Food and beverage
- Decorations
- Specialist staff as required depending on the nature of the function
- Bands and entertainers
- Accommodation
- Special requests.

8. What is included in a Function Kit?

- Details and information in relation to venue size, capacity of rooms and rooms/areas available
- Details and information in relation to alternative seating/table arrangement
- Venue facilities, services and equipment, including a range of items that can be hired for specific functions
- Sample menus
- Sample drink lists
- Suggested staffing levels for functions
- Colour photographs of different room set-ups and functions
- Contact details of the venue
- A DVD of the venue with a focus on functions.

9. What are different types of financial and operational documents that need to be prepared in relation to a function?

- Customer accounts
- Quotations
- Purchase orders
- Invoices to the client
- Statements for the client
- Receipts
- Post function reports
- Staff time sheets
- Function confirmation forms/letters
- Customer feedback form.

10. What types of information does a function manager need to collect when meeting with the client?

- A specific day and date
- Style and format of function
- Location
- Timing and duration considerations
- Food and beverages, accommodation and entertainment
- Specialist technology services
- Ancillary services and rooms
- Guest numbers
- Privacy
- Budget.

11. If a client is organising a meeting function over three days what are some questions that you could ask in relation to catering?

- Is catering required 'on arrival'? If so, what is required?
- Is there a requirement to provide catering at break times – morning tea, afternoon tea, supper? If so, what is required? Danish pastries, cake, biscuits, fruit?
- Is there any requirement to provide refreshments throughout the day for the event? This may include mints, bottled water, jugs of water, fruit juices etc.
- Is catering required for breakfast, lunch or dinner?
- Does the client want a sit-down meal or stand-up finger food for lunch?
- If it is a sit-down meal, how many courses?
- If it is finger food, what sort of food is required?
- Are there any special requests, or needs to accommodate any special health or cultural requirements?

12. Why is it important to conduct a tour of the facilities for a client in the initial meeting?

It helps them to get a visual understanding of what is available for a function.

13. When would it be a good time to provide assistance and advice to the client?

- When you feel like there are points that have not been raised
- If they ask for it
- If they are unsure about something
- If there is an offering that you feel will bring value to a function.

14. Why is it important to repeat information that you have recorded back to the client during the initial meeting?

By writing down information, not only does it show that you are taking an interest in what they are saying, but that you want to ensure that you have recorded the information accurately.

At this stage, the key is to ensure that the information that you have recorded is accurate and a true reflection of what the client is looking for.

15. What are some points to remember when preparing quotations and costings for the client?

- Follow house policies
- Make sure everything is charged for
- Only include services and products the client has requested
- Double-check your figures
- Identify and explain every charge
- Observe promises made
- Verify with management
- Present the quotation in person.

16. What are different payment options available to function clients?

- Charge back to company
- EFT
- Cash
- Debit and credit cards.

17. What information is normally included in a Function Sheet?

- Type of function – wedding, launch of product, ball
- Name, address, and contact number of client
- Day, date and time of the function
- Rooms and locations where the function will be held
- Billing instructions – who gets the bill, their address
- Menu – break-down course by course of the agreed dishes including specification of ‘on arrival’ food, morning and afternoon teas
- Beverage arrangements – description and quantities of beverages to be provided
- Sequence of service – covering timing of service, and details of when speeches and presentations will occur
- Entertainment – details of bands and the order of ceremony
- Room set up – number of tables, floor plan, decorations, table set-ups including cutlery, crockery and table accoutrements
- Type of service – plated, tray, buffet, silver service, finger food
- Special requirements – commonly relating to technology requirements such as microphone, DVD facilities, data projector, sound and lighting.

18. What different departments in the hotel would you need advice or assistance from when planning a function? What information can they provide?

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

19. What are some considerations when trying to get the right 'mix of staff'?

- The mix of experienced staff and new staff
- The mix of permanent and casually employed staff
- The mix of males to females
- The mix of skilled employees to semi-skilled employees
- The mix of language skills.

20. Having a shortage of staff is common for a function. What can you do to resolve this problem or minimise its impact?

- Utilise an emergency list of staff, with phone numbers, who can be called in at very short notice
- 'Borrowing' someone from other departments or hotels within the chain
- Get management to assist.

21. What are different types of external providers that can be used to assist a function?

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

22. A purchase order is often required when ordering stock. What information needs to be included in a purchase order?

- Purchase order number
- Supplier's name, address, telephone number
- Date of order
- Description of the item and quantity required
- Unit and total price for the hire/purchase
- Date and place of delivery of the items/services
- Payment terms and conditions
- Name, department and signature of person placing the order
- Reason for the order.

23. What is recorded in a Running Sheet?

This focuses on the identification and timing of activities within a function.

24. What are some topics within a pre-event briefing?

- Identifying customer and attendees to staff
- Overview of the function
- Describing anticipated/planned function
- Last minute changes to the running sheet
- Special requests made by the client
- Particular issues the venue expects with certain aspects of the function
- Identifying options that exist for service recovery where service timing points are exceeded
- Presentation of service standards and mention of any security issues
- Clarification of 'chain of command' for all staff including specific scopes of authority, as they may apply
- Arrangements for security, media access, meals, photo/filming opportunities, passes etc
- Specific 'Do's and don'ts' for the function
- Allocating roles and responsibilities
- Allocation of specific duties to specific staff
- Allocating stations to waiting staff and explaining seating plan
- Any last minute changes of any aspect of the function
- Checking uniforms and personal presentation of staff
- Completing time sheets
- Discussing when staff breaks will be taken during the event.

25. What is the purpose of receiving final confirmation with the customer before an event?

- Meeting with the customer to run through the Running Sheet to ensure that both parties are on the right page and to ensure that there are no obvious differences of opinion or thoughts on the event
- Accommodating last-minute changes as requested by customer, where possible
- Obtaining additional deposit, if applicable
- Confirming amended details as set out in Function Sheet.

26. What are some mise-en-place activities that would be performed by food floor staff when setting up for a function?

- Preparing, polishing and setting glasses on each table at each setting
- Preparing crockery and cutlery
- Checking that items required to support the service of menu items as listed are ready and available
- Folding napkins
- Preparing condiments
- Preparing butters
- Readying all equipment
- Checking or preparing display materials
- Preparing and checking operational readiness of cash registers
- Checking that table dressings reflect dining needs, function requirements and house requirements**.**

27. What are some things you would need to focus on when monitoring a function in operation?

- Checking running times
- Adjusting service delivery to align with Running Sheet
- Arranging changes to the agreed Running Sheet to accommodate the need to do so
- Ensuring quality service delivery
- Ensuring all customer requirements are met
- Responding to queries and requests from clients and guests
- Liaising with customer during function to check level of satisfaction
- Enquiring if customer has additional requirements during service
- Providing additional items as required – this may include tables, chairs, ashtrays, glassware
- Clearing rubbish and used items
- Monitoring security, patron behaviour and on-going safety
- Observing what is occurring and factoring these observations into action to be taken to keep the function running on-time and keep the client satisfied
- Taking action to address service problems.

28. Collecting feedback about a function is important. Who can you receive feedback from?

- Client / organiser
- Participant of the function
- Staff
- Other departments
- Suppliers.

29. What are some administration documents and activities to be performed at the conclusion of a function?

- Collating feedback from the sources identified in the previous section
- Paying out monies to any entertainers or outside suppliers for services rendered
- Receiving final payment of the client's account in accordance with the terms and conditions set out in the function contract
- Signing off staff time sheets
- Checking the facilities to determine if repairs are need, service is required or if replacement items need to be purchased
- Processing payment and posting payment record on account
- Issuing receipt and 'Thank you' letter to the client
- Completing a feedback form
- Preparing final comments about the function
- Identifying preferences that may be helpful for future functions by the client
- Adding customer comment cards
- Adding photos taken onto a database to be used as a marketing tool
- Finalising all financial documentation including closure of accounts and printing of final accounts and payments
- Storing the account file in an appropriate storage folder or area.

30. What is discussed in an event debrief?

- Congratulating staff on work that has been well done during service
- Discussing staffing issues
- Suggestions from staff regarding improvements that could be made to the implementation of future functions
- Highlighting and leading discussion on problems and issues that arose
- Providing the staff with feedback on their perspective of how the session went
- Discussing feedback received by staff from those who attended
- Reviewing the quality of service delivery provided
- Encouraging staff to identify issues of concern to them
- Discussing patron issues
- Discussing operation of ancillary services provided as part of the function
- Presenting issues or details of what can be expected in the next session
- Determining staff who will work on future functions
- Thanking staff for their efforts and contribution.

Observation Checklist

Student name	
Assessor name	
Location/venue	
Unit of competency	Organise functions D1.HSM.CL5.01 D1.HCS.CL6.04
Dates of observation	
Instructions	1. Over a period of time observe the student completing each of the following tasks: a) Identify function facilities and procedures at the host establishment b) Liaise with function customers c) Prepare for functions d) Follow-up after functions 2. Enter the date on which the tasks were undertaken 3. Place a tick in the box to show they completed each aspect of the task to the standard expected in the enterprise 4. Complete the feedback sections of the form, if required.

Did the candidate	**Yes**	**No**
Element 1: Identify function facilities and procedures at the host establishment		
Explain the role of the Functions Booking book	❑	❑
Identify the facilities available for functions	❑	❑
Identify the styles of functions that can be accommodated	❑	❑
Identify the styles of service available	❑	❑
Describe the function set-up options available	❑	❑
Describe the function menus available	❑	❑
Identify function costs for the customer	❑	❑
Develop a function kit	❑	❑
Identify the role of function-related documentation	❑	❑

Did the candidate	Yes	No
Element 2: Liaise with function customers		
Determine customer needs	❑	❑
Identify date and time of function	❑	❑
Match establishment resources to identified need for function	❑	❑
Provide advice and assistance in relation to the function	❑	❑
Record function requirements as agreed by customer	❑	❑
Confirm function booking with customer	❑	❑
Obtain deposit for function	❑	❑
Element 3: Prepare for functions		
Maintain and update Function Sheet	❑	❑
Advise colleagues and staff in relation to function	❑	❑
Roster staff for function	❑	❑
Minimise impact of function on normal establishment operation	❑	❑
Arrange for external services as identified	❑	❑
Purchase necessary stock for function	❑	❑
Prepare Running Sheet for function	❑	❑
Conduct pre-function briefings	❑	❑
Finalise function details with customer, colleagues and staff	❑	❑
Monitor set-up for the function	❑	❑
Monitor service delivery of function	❑	❑

Did the candidate	Yes	No
Element 4: Follow-up after functions		
Obtain feedback from customer	❑	❑
Obtain payment for function	❑	❑
De-brief staff	❑	❑
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:	Organise functions D1.HSM.CL5.01 D1.HCS.CL6.04		

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

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

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 1: Identify function facilities and procedures at the host establishment			
Explain the role of the Functions Booking book	❑	❑	❑
Identify the facilities available for functions	❑	❑	❑
Identify the styles of functions that can be accommodated	❑	❑	❑
Identify the styles of service available	❑	❑	❑
Describe the function set-up options available	❑	❑	❑
Describe the function menus available	❑	❑	❑
Identify function costs for the customer	❑	❑	❑
Develop a function kit	❑	❑	❑
Identify the role of function-related documentation	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 2: Liaise with function customers			
Determine customer needs	❑	❑	❑
Identify date and time of function	❑	❑	❑
Match establishment resources to identified need for function	❑	❑	❑
Provide advice and assistance in relation to the function	❑	❑	❑
Record function requirements as agreed by customer	❑	❑	❑
Confirm function booking with customer	❑	❑	❑
Obtain deposit for function	❑	❑	❑
Element 3: Prepare for functions			
Maintain and update Function Sheet	❑	❑	❑
Advise colleagues and staff in relation to function	❑	❑	❑
Roster staff for function	❑	❑	❑
Minimise impact of function on normal establishment operation	❑	❑	❑
Arrange for external services as identified	❑	❑	❑
Purchase necessary stock for function	❑	❑	❑
Prepare Running Sheet for function	❑	❑	❑
Conduct pre-function briefings	❑	❑	❑
Finalise function details with customer, colleagues and staff	❑	❑	❑
Monitor set-up for the function	❑	❑	❑
Monitor service delivery of function	❑	❑	❑

Do you believe the trainee has demonstrated the following skills? *(tick the correct response]*	**Yes**	**No**	**Not sure**
Element 4: Follow-up after functions			
Obtain feedback from customer	❑	❑	❑
Obtain payment for function	❑	❑	❑
De-brief staff	❑	❑	❑
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	Organise functions	D1.HSM.CL5.01 D1.HCS.CL6.04
Date assessment commenced		
Date assessment finalised		
Assessment decision	Pass Competent / Not Yet Competent (Circle one)	
Follow up action required (Insert additional work and assessment required to achieve competency)		
Comments/observations by assessor/s		

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

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 1: Identify function facilities and procedures at the host establishment						
Explain the role of the Functions Booking book						
Identify the facilities available for functions						
Identify the styles of functions that can be accommodated						
Identify the styles of service available						
Describe the function set-up options available						
Describe the function menus available						
Identify function costs for the customer						
Develop a function kit						
Identify the role of function-related documentation						

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 2: Liaise with function customers						
Determine customer needs						
Identify date and time of function						
Match establishment resources to identified need for function						
Provide advice and assistance in relation to the function						
Record function requirements as agreed by customer						
Confirm function booking with customer						
Obtain deposit for function						

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

Element & Performance Criteria	Observation of skills	3rd Party Statement	Oral Questions	Written Questions	Work Projects	Other
Element 3: Prepare for functions						
Maintain and update Function Sheet						
Advise colleagues and staff in relation to function						
Roster staff for function						
Minimise impact of function on normal establishment operation						
Arrange for external services as identified						
Purchase necessary stock for function						
Prepare Running Sheet for function						
Conduct pre-function briefings						
Finalise function details with customer, colleagues and staff						
Monitor set-up for the function						
Monitor service delivery of function						

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 4: Follow-up after functions						
Obtain feedback from customer						
Obtain payment for function						
De-brief staff						
Candidate signature			**Date**			
Assessor signature			**Date**			

William Angliss Institute

Specialist centre for foods, tourism & hospitality

asean

Australian Aid