

# Competency Standard

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| <b>UNIT TITLE:</b> DEVELOP CONFERENCE PROGRAMS  |   | <b>NOMINAL HOURS:</b> 40 |
| <b>UNIT NUMBER:</b> D2.TCS.CL5.09   |   |                          |
| <b>UNIT DESCRIPTOR:</b> This unit deals with skills and knowledge required to design a conference program to suit the requirements of a client.   |   |                          |
| <b>ELEMENTS AND PERFORMANCE CRITERIA</b>  | <b>UNIT VARIABLE AND ASSESSMENT GUIDE</b>   |                          |
| <p><b>Element 1: Meet with conference organiser</b></p> <p><b>1.1</b> Identify <i>timing requirements</i> for conference</p> <p><b>1.2</b> Determine <i>type, context and scope</i> for conference</p> <p><b>1.3</b> Determine <i>budget</i> for the conference</p> <p><b>1.4</b> Determine <i>catering needs</i> for the conference</p> <p><b>1.5</b> Determine <i>accommodation needs</i> for the conference</p> <p><b>1.6</b> Determine <i>if the conference can be accommodated</i></p> <p><b>1.7</b> Submit <i>draft proposal and indicative quotation</i> to client</p> <p><b>1.8</b> Book the conference with suitable suppliers and service providers</p> | <p><b>Unit Variables</b></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 the development of conference programs where the business acts as an agent for the client and liaises with service providers/suppliers, such as accommodation venues, caterers, entertainers and convention facilities within the labour divisions of the hotel and travel industries and may include:</p> <ol style="list-style-type: none"> <li>1. Travel Agencies</li> <li>2. Tour Operation</li> </ol> <p><i>Timing requirements</i> may be related to:</p> <ul style="list-style-type: none"> <li>• Start and finish date(s)</li> <li>• Duration including start and finish times of conference components such as meals, breaks, activities, special events and free time allocations</li> <li>• Identification of alternative times and dates, where applicable.</li> </ul> |                          |

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| <p><b>Element 2: Plan the conference program in conjunction with the client</b></p> <p><b>2.1</b> Assist client to <i>develop conference format</i></p> <p><b>2.2</b> Identify <i>allocation of facilities to the conference</i></p> <p><b>2.3</b> Assist in <i>developing theme</i> for the conference</p> <p><b>2.4</b> Identify <i>specific requirements</i> from identified general requirements</p> <p><b>2.5</b> <i>Maintain on-going liaison</i> with client</p> <p><b>2.6</b> Address issues arising in the planning of the conference</p> <p><b>2.7</b> <i>Determine notifications</i> for the conference</p> <p><b>2.8</b> <i>Arrange for venue facilities to be available</i> to the client</p> <p><b>Element 3: Finalise conference program</b></p> <p><b>3.1</b> Develop and submit final proposal and quotation</p> <p><b>3.2</b> <i>Negotiate finalisation of the conference</i> with client</p> <p><b>3.3</b> <i>Obtain binding confirmation</i> of the conference from the client</p> <p><b>3.4</b> <i>Confirm conference details</i> with suppliers and providers</p> <p><b>3.5</b> <i>Begin activities in accordance with approved proposal/plan</i></p> | <p><i>Determine type, context and scope for conference</i> will include:</p> <ul style="list-style-type: none"> <li>• Identifying the type of conference required by the client including conferences for single organisation, multiple-user conferences and identification of the focus and objectives for the conference</li> <li>• Identifying information relating to the format and conduct for the conference, including identification of: <ul style="list-style-type: none"> <li>▪ Workshops</li> <li>▪ Plenary sessions</li> <li>▪ Break-out sessions</li> <li>▪ Key note and support speakers</li> <li>▪ Facilitators</li> <li>▪ Entertainment</li> <li>▪ Theme(s) for the conference</li> <li>▪ Required and/or preferred conference policies, procedures and protocols</li> <li>▪ Requirements for registration of delegates including consideration of supply of name tags, pens, paper conference bags and similar</li> <li>▪ Media involvement in the conference, if any</li> <li>▪ Security requirements</li> <li>▪ Parking requirements</li> <li>▪ Exhibitors</li> <li>▪ Activities to be undertaken during or as part of the conference including touring, sight-seeing, entertainment at other venues, involvement of third party activity providers</li> <li>▪ Possible involvement of external third party providers as required by the client, for example: flower displays, information technology services, security</li> </ul> </li> </ul> |
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- Room layout including head tables, seating for conference delegates, required displays, presentation facilities and other requirements to specific conference types and client needs
  - Staging requirements including identification of technical needs for the conference
  - Identifying conference numbers including profile of those who will be attending and arrangements/identification of numbers attending nominated sessions
  - Arranging for a guided tour of identified facilities including all room/venue options and an explanation of suitability for identified aspects of the conference
  - Providing client with a conference kit from suppliers including capacity charts to indicate room/venue capacities and seating options, photographs or video of past conferences, testimonies from past clients
  - Inviting relevant managers and staff from venues to the discussion with the client.
- Determine budget* may include:
- Identifying initial budget parameters as stated by the client
  - Identifying client expectations for the budget available
  - Identifying products and services that are acceptable as on-charges
  - Identifying items that delegates are expected to pay for
  - Identifying physical, human and technical resources provided by the client to assist in controlling expenses
  - Negotiating prices including determination of relevant discounts or deals, such as meeting packages that may apply to the client
  - Explaining limitations that will apply based on the identified budget as nominated by the client
  - Suggesting cost-effective alternatives to meet budget limitations and enhance the provision of the conference.

*Determine catering needs* should include:

- Considering all food and beverage requirements, alcoholic and non-alcoholic, hot and cold, for conference delegates which may include:
  - On arrival requirements, such as tea, coffee, pastries, fruit, cakes
  - During-conference refreshments, such as water and mints
  - Catering requirements at break times
  - Meals including consideration of breakfast, lunch and dinner and identification of the level of formality of each meal
  - Supper
  - Cocktails
  - Dances and social sessions
- Identifying food and beverages to be supplied to media, where applicable
- Identifying special food and beverage requests including preferences, religious concerns and health related requirements
- Identifying various food and beverage service options and styles of service
- Identifying timing requirements for food and beverage delivery and duration of service
- Identifying limitations that apply to 'free bar' facilities, if applicable
- Meeting with chefs from venues to obtain their input
- Arranging for a variety of food, drinks and wine menus at a variety of price points, including taste tests, where appropriate
- Explaining the advantages and disadvantages of various catering options, in terms of time, cost, room use, social interaction and networking.

*Accommodation needs* should relate to:

- Delegate needs
- Partners of delegates
- Media
- Use of day-use rooms
- Use of baggage and other storage rooms
- Determining the ancillary items that are to be included in accommodation charges, including meals, entertainment, transfers and special use of establishment facilities
- Numbers and types of rooms required
- Date(s) accommodation is required
- Preferences for grouping conference delegates together
- Identifying in-room facilities required by delegates
- Identifying in-house support services required by delegates including functions, laundry, security, transport, spa and nominated other facilities.

*Determine if the conference can be accommodated* may include:

- Checking with established providers to identify availability of required rooms and facilities
- Sourcing new service providers to accommodate conference needs
- Identifying, investigating and costing external service provision requirements that are required to service the conference.

*Submit draft proposal and indicative quotation* may include:

- Conducting supplementary meetings with client to clarify requirements and issues
- Seeking quotations from providers/suppliers including the determination of commissions involved and/or charges for services to be made

- Organising and providing samples of products from suppliers, as required
  - Making presentations to the client at their premises/business including involvement of manager(s) and staff from suppliers/providers
  - Clarifying ambiguous requirements
  - Preparing a formal proposal for submission to client that specifies the goods and services to be delivered including names and contact details of anticipated and/or alternative providers, where applicable, plus service delivery standards that can be expected
  - Providing prices for individual elements of the conference as requested by the client together with a final price for the conference
  - Identifying items that are to be regarded as add-on costs to be charged on a fee-for-service basis as used by the conference
  - Identifying non-negotiable and negotiable price-related items
  - Identifying requirements for securing a booking including payment related details and timelines that apply to final notification of numbers attending, food and beverage menu selections and final room set-ups
  - Communicating the terms and conditions of trade for all suppliers/providers and for the agency relating to cancellations, charges, invoicing and general conditions, such as smoking, access and other as appropriate
  - Meeting with the client to explain the proposal and quotation as opposed to simply supplying the proposal and quotation without comment
  - Ensuring the proposal and quotation are identified as draft and indicative including a statement that a final proposal and quotation will be supplied when outstanding matters have been finalised and that prices are subject to change without notice.
- Develop conference format may include:*
- Assisting in creating the final structure and sequence of conference sessions
  - Engaging in on-going liaison with service providers/suppliers

- Identifying the timing and facility requirements for conference options including break-out and other sessions
- Suggesting and/or presenting format options to client where requested to do so
- Confirming catering requirements for each stage of the conference including notification to suppliers
- Verifying previously stated and identified requirements including revising and amending as required
- Confirming accommodation and other room/facility use requirements for the conference with suppliers/providers
- Firming up delegate numbers and notifying suppliers/providers
- Making final decisions in relation to identified speakers, entertainment, conference-related activities, free time activities, tours and sight-seeing.

*Allocation of facilities to the conference may include:*

- Determining the suppliers/venues who may be involved in service provision/delivery
- Blocking room numbers in accommodation facilities for the period of the conference, as required
- Booking conference facilities and other allied requirements for the conference
- Filing booking notifications and confirmations from suppliers/providers
- Advising client of progress with the plans and bookings for the conference
- Liaising with client and suppliers/providers to determine the most appropriate and effective use of the limited establishment facilities that exist.

*Assist in developing theme may include:*

- Making suggestions and recommendations in conjunction with suppliers/providers
- Undertaking additional site tours of suppliers/providers with the client

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|  | <ul style="list-style-type: none"> <li>• Providing details of previous conferences at potential suppliers/providers to assist with client decision making</li> <li>• Advising the client where themes are unlikely to work.</li> </ul> <p><i>Identify specific requirements</i> may include:</p> <ul style="list-style-type: none"> <li>• Quantifying specific materials required to produce or construct required staging, displays and other identified necessities</li> <li>• Identifying specific types of equipment required to support nominated activities and requirements</li> <li>• Identifying specific brands of products as preferred by the client</li> <li>• Fine-tuning the numbers and general conference requirements including releasing blocked rooms back onto the board for sale</li> <li>• Determining final room set-ups for individual sessions including consideration of various styles including theatre, boardroom, u-shape, dinner, dinner dance and cocktails sessions</li> <li>• Notifying suppliers/providers of information obtained from client.</li> </ul> <p><i>Maintain on-going liaison</i> may include:</p> <ul style="list-style-type: none"> <li>• Providing contact details to the client</li> <li>• Being available at times and locations to suit client need</li> <li>• Scheduling meetings to discuss and resolve conference matters</li> <li>• Providing hard copies of decisions that have been taken, or advised, verbally</li> <li>• Maintaining a conference file of all documentation and decisions relating to the conference including communications from suppliers/providers</li> <li>• Speaking to client nominated groups on behalf of the client organiser to explain matters and provide required information</li> </ul> |
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|  | <ul style="list-style-type: none"> <li>• Acting as an advocate for the client when representing their interests to providers/suppliers</li> <li>• Working on behalf of the client to achieve their stated objectives.</li> </ul> <p><i>Determine notifications</i> may include:</p> <ul style="list-style-type: none"> <li>• Identifying the role of the business in notifying conference delegates regarding the conference</li> <li>• Identifying the role of the business in accepting bookings and registrations including deposits and payments, where applicable for the conference</li> <li>• Advertising the conference on the business website including password protected access to relevant sections, as required by the client</li> <li>• Issuing media statements in relation to the conference including pre-conference, during conference and post-conference releases</li> <li>• Developing a standard media kit for the conference</li> <li>• Direct mailing conference material to delegates as nominated by the client</li> <li>• Passing on registration and allied details to the client on a regular basis.</li> </ul> <p><i>Arrange for venue facilities to be available</i> may include:</p> <ul style="list-style-type: none"> <li>• Liaising with client and providers/suppliers to facilitate inspection of the property and venue facilities for planning purposes</li> <li>• Assisting client with their plans relating to positioning of items within conference rooms and identified venues</li> <li>• Arranging for client to experience and sample the facilities, services and products of the suppliers/providers including provision of complementary meals, accommodation, food/drinks, entertainment and other services as deemed relevant to the requirements of the proposed conference.</li> </ul> |
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*Negotiate finalisation of the conference* may include:

- Meeting with suppliers/providers and the client to confirm final proposal and quotation
- Negotiating prices with client and/or suppliers/providers
- Suggesting substitutions and alternatives for items deemed by the client to be inappropriate or too expensive
- Achieving a win-win situation for the business, suppliers/providers and the client
- Identifying the selling price below which the conference will not be accepted
- Refusing/regretting the conference if a viable selling price cannot be agreed.

*Obtain binding confirmation* may include:

- Signing of a contract
- Obtaining payment of a deposit.

*Confirm conference details* may include:

- Notifying venues in relation to confirmation of the conference
- Making payments to identified venues, suppliers and service providers to formalise the conference booking
- Advising relevant personnel in relation to next steps to be taken regarding implementation of the conference
- Seeking verification that all bookings that have been made are confirmed.

*Begin activities in accordance with approved proposal/plan* may include:

- Communicating with suppliers/service providers and organising products and services to be provided by them, where required
- Initiating action within the business to coincide with planned timelines to facilitate effective and successful delivery of the conference by the identified suppliers/providers.

### **Assessment Guide**

The following skills and knowledge must be assessed as part of this unit:

- Enterprise policies and procedures in regard to meetings, incentives conferences and exhibitions (MICE) as well as all related issues such as service delivery, terms and conditions, payment, security, and interaction with the media
- Principles of catering and food and beverage service options
- Knowledge of typical conference formats
- Knowledge of general client expectations in relation to conferences and their delivery
- Knowledge of the host establishment including layout, products and services available
- Knowledge of products and services that can be obtained for inclusion in the provision of a conference at the host establishment
- Ability to use selling, communication, negotiation and interpersonal skills
- Ability to prepare proposals and quotations
- General industry knowledge
- Knowledge of the range of options available for staging and room set-ups.

### **Linkages To Other Units**

- Source and package tourism products and services
- Plan, manage and conduct meetings
- Organise and prepare food products and services
- Work effectively with colleagues and customers
- Apply basic techniques of commercial cookery
- Develop and maintain food and beverage product knowledge
- Provide food and beverage services

- Promote products and services to customers
- Prepare and deliver a presentation
- Book and coordinate supplier services
- Manage contractual agreements/commitments.

### **Critical Aspects of Assessment**

Evidence of the following is essential:

- Understanding of host agency policies and procedures in regard to meetings, incentives conferences and exhibitions (MICE) as well as all related issues such as service delivery, terms and conditions, payment, security and interaction with the media
- Demonstrated ability to meet with a real or simulated conference organiser to develop a conference program which must include:
  - Identification of dates(s), times and budget limitations
  - Identification of nature, context, format and objectives
  - Identification of catering and accommodation requirements
  - Preparation of a written proposal:
    - Identifying by name the venue(s) that can deliver the identified requirements, including evidence of their ability to do so
    - Identifying by name all ancillary service providers required to supplement the services, products and facilities available from the primary venue(s)
    - Describing an appropriate theme for the conference
  - Preparation of a formal written quotation, including relevant terms and conditions, that supports the proposal.

### **Context of Assessment**

Assessment must ensure:

- Actual or simulated workplace application of planning activities which may include visits to venues, suppliers and service providers.

**Resource Implications**

Training and assessment must include a real or simulated conference development context, including real or simulated conference requirements, real venues, real suppliers and real service providers.

**Assessment Methods**

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

- Observation of practical candidate performance
- Portfolio of documentation developed as part of the planning process including letters/e-mails requesting information from providers, information supplied by providers, draft and final proposals and quotations, records of meetings with the client and conference details/requirements furnished by the client
- Feedback from the real or simulated conference organiser, suppliers and other relevant participants in the planning process
- 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*

|  | <b>Key Competencies</b>                          | <b>Level</b> | <b>Examples</b>  |
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|  | Collecting, organising and analysing information | 1            | Obtain conference details and requirements from the conference organiser   |
|  | Communicating ideas and information              | 2            | Making suggestions and recommendations to the client in relation to venues, suppliers and service providers      |
|  | Planning and organising activities               | 3            | Organising bookings and activities with venues, suppliers and service providers; scheduling meetings with client |
|  | Working with others and in teams                 | 2            | Cooperating with venues, suppliers and service providers to produce an acceptable conference proposal            |
|  | Using mathematical ideas and techniques          | 2            | Calculating costs  |
|  | Solving problems                                 | 2            | Resolving planning issues as they arise  |
|  | Using technology                                 | 1            | Using the internet to research potential venues, suppliers and service providers and communicate with client     |