



Australian Government

SITXEVT401 Plan in-house events or functions

Release 1

SITX EVT 401 Plan in-house events or functions

Modification History

The version details of this endorsed unit of competency set are in the table below. The latest information is at the top.

Version	Comments
1.0	N Replaces but is not equivalent to SITX EVT 005B Organise in-house events or functions. New title. Re-worked Elements, Performance Criteria, Required skills and Required knowledge to more fully articulate content. Content about calculating quotations and monitoring event set up and operation duplicates content in SITTTSL304 Prepare quotations and SITX EVT 505 Manage on-site event operations and has been removed. Re-worked Evidence Guide to better articulate rigorous assessment requirements.

Unit Descriptor

This unit describes the performance outcomes, skills and knowledge required to plan the delivery of events or functions within a commercial venue. It requires the ability to identify the customer's operational needs and preferences, prepare and confirm event proposals and finalise operational documents for the delivery of events.

Application of the Unit

Events are diverse in nature and this unit is relevant to any type of event coordinated in any industry context, including the tourism, hospitality, sport, cultural and community sectors. This unit applies to event coordinators who operate independently, and are responsible for making a range of operational decisions. They work in commercial event or function venues such as hotels, clubs, theatres, function, convention and exhibition centres.

Licensing/Regulatory Information

No licensing, legislative, regulatory or certification requirements apply to this unit at the time of endorsement.

Pre-Requisites

Not applicable.

Employability Skills Information

This unit contains employability skills.

Elements and Performance Criteria Pre-Content

Elements and Performance Criteria

Elements describe the essential outcomes of a unit of competency. Performance criteria describe the performance needed to demonstrate achievement of the element. Where bold italicised text is used, further information is detailed in the required skills and knowledge section and the range statement. Assessment of performance is to be consistent with the evidence guide.

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|--|--|
| 1. Liaise with event customer to satisfy service expectations. | 1.1 Discuss and clarify purpose and scope of <i>event or function</i> with <i>customer</i> .
1.2 Liaise with customer to determine specific <i>operational</i> needs, preferences and budget for event.
1.3 Conduct customer site inspection as required.
1.4 Hold ongoing discussions about event plans to satisfy all customer requirements and service expectations. |
| 2. Prepare and confirm event proposals. | 2.1 Analyse and document event staging requirements based on detailed review of customer brief.
2.2 Identify and pursue additional sales opportunities to ensure maximum event profitability.
2.3 Develop <i>options and ideas</i> on event concept, theme and format for inclusion in event proposal.
2.4 Verify the operational and service practicality of proposal through consultation with colleagues and suppliers.
2.5 Present proposal including accurate information on costs and range and style of products and services.
2.6 Negotiate and agree to final event details.
2.7 Prepare and issue relevant <i>event documentation</i> to customer and update as changes occur. |
| 3. Coordinate event services. | 3.1 Liaise with internal personnel and external suppliers to facilitate effective event planning.
3.2 Identify environmental and social impacts and ensure services are organised to minimise these.
3.3 Identify <i>event components</i> and create a schedule to facilitate event service bookings.
3.4 Issue event orders to <i>venue departments</i> and external suppliers according to event deadlines and update as changes occur.
3.5 Prepare and distribute <i>operational documentation</i> to internal personnel and suppliers according to organisational procedures.
3.6 Develop and provide <i>event briefings</i> to relevant operations personnel in advance of the event.
3.7 Minimise use of printed materials and maximise electronic |

- transmission of documents to reduce waste.
4. Finalise event and evaluate operational success.
- 4.1 Prepare final customer invoices and check and authorise payment of supplier invoices.
 - 4.2 Obtain feedback from customers and seek input from personnel and contractors on event operations.
 - 4.3 Reflect on and evaluate operational problems.
 - 4.4 Use all information to enhance future event planning activities.

Required Skills and Knowledge

This section describes the skills and knowledge required for this unit.

Required skills

- communication skills to consult and liaise on event requirements with customers, internal personnel and external suppliers
- critical thinking skills to analyse event staging requirements and consider and determine practicality of various options
- initiative and enterprise skills to:
 - develop and explore a range of ideas for event concepts, themes and formats
 - pursue additional sales opportunities to enhance event profitability
- learning skills to seek and assimilate new knowledge of event staging options from external suppliers
- literacy skills to:
 - read and interpret unfamiliar and detailed product and technical information from event staging supply organisations
 - research new product and service options for event staging
 - write complex and detailed, yet easily accessible event operational documents
- numeracy skills to:
 - calculate the number of products and services required for the event or function
 - calculate timings for the delivery of the event
- planning and organising skills to access and sort all information required for event proposals and plans and to write and submit them within designated deadlines
- problem-solving skills to:
 - anticipate and analyse service difficulties for options proposed and to resolve or abandon ideas before submitting proposals
 - identify event impacts and organise services to minimise these
- self-management skills to take responsibility for development of event proposals and plans
- teamwork skills to consult with internal personnel and external suppliers to facilitate effective event planning
- technology skills to use event industry computerised operations systems and word processing, presentation and spread sheet software packages.

Required knowledge

- characteristics of different types of events and functions staged in commercial venues:
 - purpose and format
 - roles and responsibilities of different corporate clients, family members and officials
 - event running order
 - entertainment and speeches
 - service order and timing for food and beverage items to complement event or function activities

- key features and functions of event staging products and services including:
 - catering
 - displays, stands and signage
 - exhibitor services
 - security
 - talent:
 - entertainers
 - speakers
 - technical equipment and services:
 - audio-visual
 - lighting
 - rigging
 - sets
 - sound
 - special effects
 - stage design
 - venue or site:
 - furniture
 - layouts
 - registration areas and equipment
 - styling
- a range of styles for setting up venue rooms and their different purposes including:
 - banquet
 - classroom
 - conference
 - theatre
 - u shape
- a range of formats for, inclusions and uses of:
 - event proposals
 - event documentation issued to customers including booking conditions, confirmation letters, contracts and invoices
 - event operational documentation including event orders
 - floor plans
 - menus
- key environmental and social impacts of event delivery and minimal impact procedures to reduce these including:
 - lifestyle of neighbouring residents
 - recycling and disposal of all waste, especially hazardous substances
 - safety for crowds and the movement of large numbers of attendees
 - use of energy, water and other resources during event set-up, operation and

break-down

- for the specific organisation:
 - comprehensive product knowledge of venue features and capacity to service different types of events
 - procedures and deadlines for preparing proposals and booking internal and external event services
 - role of different venue personnel in the event management process.

Evidence Guide

The evidence guide provides advice on assessment and must be read in conjunction with the performance criteria, required skills and knowledge, range statement and the Assessment Guidelines for the Training Package.

Overview of assessment

Critical aspects for assessment and evidence required to demonstrate competency in this unit

Evidence of the ability to:

- plan in-house events or functions involving:
 - comprehensive event plans
 - multiple operational components
 - an event operations team
- plan the delivery of multiple events or functions within a venue to meet the operational requirements of diverse customers
- prepare and present accurate and comprehensive event proposals, customer and operational documents for events
- liaise with internal personnel and external suppliers to facilitate effective event planning and book their services
- integrate knowledge of:
 - purpose and format for different types of events and functions staged in commercial venues
 - key features and functions of event staging products and services
 - venue features and capacity to service different types of events
 - formats for and inclusions of event documentation
- plan events and issue documents within commercial time constraints and event deadlines.

Context of and specific resources for assessment

Assessment must ensure use of:

- actual events or functions which are planned for and delivered within a venue. Events may be created for the specific purpose of skills assessment, but must still meet the requirements outlined under Critical aspects of assessment, and have commercial, community or business relevance. Small personal events are not appropriate as a means of assessing a individual's skills and knowledge
- venues and sites where events are operated; these can be:
 - real event venues and sites
 - event venues and sites operated within a training organisation such as auditoria, exhibition areas, conference rooms, restaurants and sporting facilities where real events are staged

- customers with whom the individual can interact
- internal personnel and external suppliers with whom the individual can interact
- a computerised operations system currently used in the events industry to administer event planning functions
- current and comprehensive event venue information:
 - product information within sales kits, brochures, product manuals, information kits or information databases
 - site specifications, operational and capacity information
 - technical production and staging specifications
- industry current template documents for:
 - event proposals
 - event documentation issued to customers including booking conditions, confirmation letters, contracts and invoices
 - event operational documentation including event orders
 - floor plans
- procedures for preparing proposals.

Method of assessment

A range of assessment methods should be used to assess practical skills and knowledge. The following examples are appropriate for this unit:

- direct observation, using role plays, of the individual:
 - interacting with customers to elicit information on their event requirements
 - interacting with internal venue staff and external suppliers to facilitate effective event planning
- evaluation of documents prepared by the individual:
 - event proposals
 - event documentation issued to customers including booking conditions, confirmation letters, contracts and invoices
 - event operational documentation including event orders
- case studies and problem-solving exercises to allow the individual to analyse and respond to service difficulties for different event staging options and event impacts for different types of events
- written or oral questioning to assess knowledge of:
 - purpose and format for different types of events and functions staged in commercial venues
 - key features and functions of event staging products and services
 - venue features and capacity to service different types of events
 - formats for and inclusions of event documentation

- review of portfolios of evidence and third-party workplace reports of on-the-job performance by the individual.

**Guidance information
for assessment**

The assessor should design integrated assessment activities to holistically assess this unit with other units relevant to the industry sector, organisation and job role, for example:

- BSBWRT401A Write complex documents
- SITTTSL303 Sell tourism products and services
- SITTTSL304 Prepare quotations
- SITTTSL306 Book supplier services
- SITXCCS401 Enhance the customer service experience
- SITXEVT505 Manage on-site event operations.

Range Statement

The range statement relates to the unit of competency as a whole. It allows for different work environments and situations that may affect performance. Bold italicised wording, if used in the performance criteria, is detailed below. Essential operating conditions that may be present with training and assessment (depending on the work situation, needs of the candidate, accessibility of the item, and local industry and regional contexts) may also be included.

Event or function may include:

- balls
- banquets
- business and corporate
- entertainment and leisure
- exhibitions, expositions and fairs
- festivals
- fundraising
- government and civic
- industry and other awards presentations
- marketing
- meetings and conventions
- parties
- religious celebrations
- social
- sports
- wakes
- weddings.

Customer may include:

- business to business
- committees
- corporate
- event management companies
- government
- the media
- retail.

Operational needs and preferences may relate to:

- accommodation
- budget
- entertainment
- floor plans
- date
- decorations
- floral products
- food and beverage
- format, style and duration
- event program
- menu type

- link between food service and other aspects of the event, such as speeches
- numbers of attendees
- on-site registration of attendees
- security
- set up of:
 - client displays and livery
 - exhibitor or sponsor stands
 - merchandising stands
 - seating
 - tables
- style of service
- styling of the venue
- technical equipment
- theming
- timing of service.

Options and ideas may relate to:

- additional technical services
- different approaches to use of space
- incorporating theming
- refining or adjusting catering options
- styling the venue
- using additional parts of the venue.

Event documentation may include:

- access and security details
- booking conditions
- car parking facilities
- confirmation letters
- contracts
- floor plans
- invoices
- menus
- safety information.

Event components may include:

- accommodation
- contract staff
- entertainment
- decorations
- floral products
- food and beverage
- internal service staff
- interpreters
- security
- speakers

- technical equipment and services:
 - audio-visual
 - pyrotechnics
 - rigging
 - sound and lighting
 - special effects
 - stage design and construction
 - venue styling.

Venue departments may include:

- environmental services
- exhibition operations
- food and beverage
- front of house
- kitchen operations
- linen services
- production services
- security
- technical services.

Operational documentation may include:

- briefing papers
- emergency phone contacts
- layout plan for venue or site
- program
- registration reports:
 - attendance lists per session, site, venue or table
 - name lists
 - special requests
- running sheet
- schedules
- service vouchers
- signage
- site maps.

Event briefings may:

- be:
 - face-to-face
 - in writing
 - on telephone
- involve clarification of:
 - access times for service personnel, client and attendees
 - client expectations
 - client role in event management
 - event program and scheduled time for activities
 - hierarchy of responsibility for instructions, controls

and resolution of problems during event operation

- procedures for event staging
- regulatory compliance and roles and responsibilities of individual team members
- roles and responsibilities of internal staff, contractors and volunteers
- service expectations
- staffing rosters
- work health and safety.

Unit Sector(s)

Cross-Sector

Competency Field

Events