

CUFADM01A Prepare a proposal

This unit describes the skills and knowledge required to prepare a proposal, formal tender or submission document for a project in the cultural industries.

Element	Performance criteria
1 Analyse the project requirements	<ul style="list-style-type: none">1.1 Identify project/client requirements1.2 Identify the criteria and specifications to ensure that proposal/tender conforms to specifications
2 Determine ability to meet the requirements of the brief	<ul style="list-style-type: none">2.1 Identify resources and equipment needed to comply with the proposal/tender requirements2.2 Determine capability to meet the requirements in consultation with relevant personnel
3 Estimate the costs and availability of resources	<ul style="list-style-type: none">3.1 Establish the costs and availability of industry personnel, equipment hire or purchase3.2 Develop a detailed costing covering all aspects of work required for completion of the project3.3 If there are areas where the brief is unclear, discuss them with the client3.4 Provide for contingencies based on industry practice and past experience
4 Prepare the proposal/tender submission	<ul style="list-style-type: none">4.1 Prepare the proposal/tender document including detailed specification of the work to be done and detailed costing4.2 Express all information clearly and accurately and ensure that it is relevant4.3 Discuss the proposal/tender with appropriate colleagues and experts, incorporate feedback4.4 Prepare and submit the proposal/tender to the client by the required date4.5 Evaluate the proposal/tender against the requirements of the brief
5 Present the submission where appropriate	<ul style="list-style-type: none">5.1 Present the proposal/tender in a professional and effective manner5.2 Explain the benefits and creative features of the proposal/tender

6 Obtain confirmed agreement where appropriate

6.1 Confirm agreement on the proposal/tender in writing without delay

6.2 Ensure that any amendments are clearly documented

Range of variables

Variable

Scope

Resources and equipment may vary from one industry sector to another and may include:

- cameras, film/tapes, sets, props, costumes
- computers, software
- sound and recording equipment
- musical equipment
- skilled personnel, artistic technical and management
- accommodation, venues
- office space, supplies and equipment
- others relevant for the particular project

Cost items may include:

- equipment
- personnel
- supplies/consumables

Contingencies may include:

- weather
- technical difficulties
- industrial relations considerations
- illness/accidents/incidents
- others as relevant to the sector

Relevant personnel may include:

- production designer
- performer
- production staff
- supervisor
- head of department
- director
- producer
- technical director
- other technical staff
- other specialist staff
- designers
- floor manager

Evidence guide

Underpinning skills and knowledge

Assessment must include evidence of essential knowledge of, and skills in, the following areas:

- communication, including liaison, customer service, negotiating, report writing
- consultation, including interpersonal, listening, questioning, gaining feedback, giving information
- observation
- project management
- comprehensive knowledge of the industry sector
- accurate interpretation of documentation
- appropriate effective format for presentations of proposal/tenders

Linkages to other units

This unit has strong linkages to the following units and combined training delivery and/or assessment may be appropriate:

- CUEFIN1A Develop a budget
- CUSFIN01A Finance a project
- CUFRAD01A Originate and develop a concept

Critical aspects of evidence

This unit of competence applies to a range of industry sectors. The focus of assessment will depend on the industry sector. Assessment must be customised to meet the needs of the particular sector in which performance is being assessed.

Assessment should only address those variable circumstances, listed in the range of variables statements, which apply to the chosen context.

The following evidence is critical to the judgement of competence in this unit:

- production of an effective, complete and well presented proposal/tender that meets all the specifications of the brief
- the employment of an appropriate process for the development of the proposal/tender

Method and context of assessment Assessment may take place on the job, off the job or a combination of both of these. Off the job assessment must be undertaken in a closely simulated workplace environment.

Assessment may incorporate a range of methods to assess performance and the application of essential underpinning knowledge, and might include:

- practical demonstration (direct observation may need to occur on more than one occasion to establish consistency of performance)
- case studies
- work samples or simulated workplace activities
- oral questioning/interview
- projects/reports/logbooks
- third party reports and authenticated prior achievements
- portfolios of evidence

Resource requirements Workplace based assessment should be based on access to the information required for the development of an effective proposal/tender for that particular workplace.

Key competencies

Level

Collecting, organising and analysing information	3
Communicating ideas and information	3
Planning and organising activities	1
Working with others and in teams	2
Solving problems	1
Using mathematical ideas and techniques	2
Using technology	1