



# Experiential Learning Portfolio for 10106123 Meeting and Event Planning

## Student Contact Information:

Name: \_\_\_\_\_ Student ID#: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

*It is **required** that you speak with the Academic Dean or instructor who teaches this course prior to completing a portfolio.*

## Directions

Consider your prior work, military, volunteer, education, training and/or other life experiences as they relate to each competency and its learning objectives. Courses with competencies that include speeches, oral presentations, or skill demonstrations may require scheduling face-to-face sessions. You can complete all of your work within this document using the same font, following the template format.

1. Complete the Student Contact Information at the top of this page.
2. Write an Introduction to the portfolio. Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.
3. Complete each "Describe your learning and experience with this competency" section in the space below each competency and its criteria and learning objectives. Focus on the following:
  - What did you learn?
  - How did you learn through your experience?
  - How has that learning impacted your work and/or life?
4. Compile all required and any suggested artifacts (documents and other products that demonstrate learning).
  - Label artifacts as noted in the competency
  - Scan paper artifacts
  - Provide links to video artifacts
  - Attach all artifacts to the end of the portfolio
5. Write a conclusion for your portfolio. Briefly summarize how you have met the competencies.
6. Proofread. Overall appearance, organization, spelling, and grammar will be considered in the review of the portfolio.
7. Complete the Learning Source Table. Provide additional information on the business and industry, military, and/or volunteer experiences, training, and/or education or other prior learning you mentioned in your narrative for each competency on the Learning Source Table at the end of the portfolio. Complete this table as completely and accurately as possible.

The portfolio review process will begin when your completed portfolio and Credit for Prior Learning Form are submitted and nonrefundable processing fees are paid to your local Credit for Prior Learning contact. Contact Student Services for additional information.

Your portfolio will usually be evaluated within two weeks during the academic year; summer months may be an exception. You will receive an e-mail notification regarding the outcome of the portfolio review from the Credit for Prior Learning contact. NOTE: Submission of a portfolio does not guarantee that credit will be awarded.

You have 6 weeks to appeal any academic decision. See your student handbook for the complete process to appeal.

**To receive credit for this course, you must receive “Met” on 8 of the 10 competencies.**

**10106123 Meeting and Event Planning, 3 Associate Degree Credits**

**Course Description:** In this course, students will deepen their understanding of planning meetings and events. Students learn about event planning and budgeting, negotiation and contracts, income projections, food and beverage coordination, technology utilization, and logistics management.

If you receive credit for prior learning for this portfolio, you will also receive a “Met” score for the following **Technical Skills Attainment Program Outcomes** that are assessed in this specific course:

**Introduction:** Briefly introduce yourself to the reviewer summarizing your experiences related to this course and your future goals.

**Competency 1: Outline the anatomy of meetings and events**

Criteria: Performance will be satisfactory when:

- you identify the components of an event outline
- you define key vocabulary terms associated with meetings and events
- you identify the components of a business agenda
- you identify types of meetings and events planning
- you identify the purpose of meetings and events

Learning Objectives:

- a. Define areas of meeting and event planning
- b. Define vocabulary terms used with meeting and event planning
- c. Analyze the components of an event outline
- d. Analyze the components of a standard meeting agenda

**Required Artifacts: None**

**Suggested Artifacts: None**

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 2: Explore the characteristics of an effective event planner**

Criteria: Performance will be satisfactory when:

- you identify the characteristics of an effective event planner
- you describe the importance of effective communication

Learning Objectives:

- a. Describe the characteristics of an effective event planner
- b. Explain the importance of clear and effective communication

**Required Artifacts: None**

**Suggested Artifacts: None**

**In your experience, how did you communicate effectively to a team? What skills did you need on the job and what happened if those skills lacked?**

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 3: Plan for meetings and events**

Criteria: Performance will be satisfactory when:

- you list the tasks for planning a meeting
- you list the tasks for planning an event
- you identify participants needed to plan a meeting
- you identify participants needed to plan an event

Learning Objectives:

- a. Differentiate types of events and meetings
- b. Examine the components of event planning
- c. Explain the roles of meeting and event participants
- d. Outline the objectives of events

**Required Artifacts: None**

**Suggested Artifacts:** Agendas, objectives, outlines

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 4: 4. Generate an event budget**

Criteria: Performance will be satisfactory when:

- budget identifies the total amount available for the event
- budget includes components for a specific event
- budget allocates amount for each component

Learning Objectives:

- a. Analyze the components of an event budget
- b. Identify sources of revenue for events
- c. Differentiate between fixed and variable expenses
- d. Explain the importance of monitoring and revising budgets throughout planning

**Required Artifacts: None**

**Suggested Artifacts:** Sample of a spreadsheet of a budget.

Note: You can delete titles if sensitive information. Need to prove you can create an event budget and include the necessary items in the budget. Using Excel preferably. Include a spreadsheet to include specific costs. What are the event expenses and revenue? Is this for profit or non-profit event? Need formulas to calculate.

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 5: Prepare contracts and negotiations for events**

Criteria: Performance will be satisfactory when:

- contract is prepared using a contract event template
- contract includes elements specific to an identified contract

Learning Objectives:

- a. Outline contracts for different event needs
- b. Develop written agreements for events
- c. Identify policies and procedures for events
- d. Design clauses to fit event needs
- e. Explain the basic elements of a service contract including cancellation processes and refunds
- f. Identify types of service providers and available services

**Required Artifacts: None**

**Suggested Artifacts:** Can provide sample artifacts here.

**What was your process, how did you deal with contracts and negotiations?**

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 6: Examine logistics and management for events**

Criteria: Performance will be satisfactory when:

- presentation outlines site set-up, operation, and break-down procedures
- presentation identifies rental needs for event
- presentation explains security, medic, and safety needs for event
- presentation identifies risk management
- presentation identifies specific requirements of an event site
- presentation identifies entertainment and speaker needs
- presentation identifies staffing needs

Learning Objectives:

- a. Define site requirements - for example building codes, parking, capacity, transportation needs
- b. Identify laws, rules, and regulations of community
- c. Determine site set-up and break-down procedures
- d. Explain operation procedures of an event
- e. Determine security, medic, and safety needs of an event
- f. Identify process for securing speakers or entertainment
- g. Secure rental needs (tents, furniture, silverware, glassware, technology, etc.) for an event
- h. Schedule staff and/or volunteers for event

**Required Artifacts: None**

**Suggested Artifacts:** Can provide sample artifacts here

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**



**Competency 7: Formulate a layout for meetings and events**

Criteria: Performance will be satisfactory when:

- event layout includes location of seating
- event layout includes location of food and beverage
- event layout includes location of technology and/or entertainment
- event layout includes location for staff prep and storage
- event layout includes location of welcome table
- event layout promotes effective flow
- event layout acknowledges special needs and safety

Learning Objectives:

- a. Determine the best layout for different events
- b. Incorporate safety, fire codes, and special needs of guests
- c. Determine appropriate placement of food and beverage
- d. Identify food and beverage safety needs
- e. Determine technology and entertainment logistics
- f. Outline a floor plan to produce the best flow

**Required Artifacts: None**

**Suggested Artifacts: Can provide sample artifacts here**

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 8: Plan food and beverage needs for meetings and events**

Criteria: Performance will be satisfactory when:

- menu plan identifies provider of food and beverage
- menu plan identifies wait staff and bartender needs
- menu plan includes style of meal - buffet vs plated
- menu plan includes selection of items served
- menu plan identifies items for special dietary needs
- menu plan includes beverages
- menu plan includes guest count
- menu plan includes timing of service
- menu follows food and beverage laws

Learning Objectives:

- a. Communicate with food vendor to determine menu
- b. Determine guest count
- c. Determine style of meal - buffet vs plated
- d. Identify rental needs for food and beverage
- e. Determine staffing needs
- f. Identify options for special dietary needs
- g. Explain food and beverage laws

**Required Artifacts: None**

**Suggested Artifacts: None**

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 9: Outline marketing and advertising for meetings and events**

Criteria: Performance will be satisfactory when:

- Invitation to the event - registration url included
- Technology requirements for event, social medial platforms used, how to market to participants - writing project

Learning Objectives:

- a. marketing piece includes event details (date, time, location, etc.)
- b. marketing piece includes a creative design related to event
- c. marketing strategy identifies target audience
- d. marketing strategy identifies media needs
- e. marketing strategy identifies direct and indirect tactics
- f. marketing strategy includes timelines
- g. marketing strategy includes pricing

**Required Artifacts: None**

**Suggested Artifacts:** Sample of marketing from your events

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

**Competency 10: Examine the process of closing out an event**

Criteria: Performance will be satisfactory when:

- you close out spreadsheet and pay all bills
- you debrief with the planning team and document any improvements that need to be made
- you write thank-you's where appropriate
- you write formal report to include everything for future event
- you create survey tool for participants and workers for feedback

Learning Objectives:

- a. Calculate the cost of event and close out spreadsheet (pay the bills)
- b. Critique the stages of the event and planning process for future changes
- c. Write thank-you notes to constituents involved with the event
- d. Write a final report to include everything from the event - one-stop-shop for future event
- e. Create an evaluation through a survey for client and partner satisfaction

**Required Artifacts: None**

**Suggested Artifacts:** Can provide sample artifacts here

**What was your process of closing out the event?**

**Describe your learning and experience with this competency:**

**Met/ Not Met Evaluator Feedback:**

