



CUA50715 Diploma of Graphic Design

 CUAIND402 Provide freelance services

Project

Assessment Number: 33552/01

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**Competency details**

The CUAIND402 unit describes the skills and knowledge required to work as an independent operator within the creative arts industry.

It applies to individuals who use a high level of self-motivation and discipline, and an entrepeneurial attitude when pursuing work opportunities. They are engaged for specific projects and are responsible for promoting themselves to potential clients, negotiating their own contracts and managing their business affairs.

**Assessment tasks**

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| --- | --- | --- |
| **Assessment number** | **Assessment name and type** | **Marking time** |
| 33552/01  | Project |  |

Instructions

To help Open Colleges manage your assessment, please use the following file-naming convention when you save your Microsoft Word document. Your file should be named and saved to your computer hard drive using your:

[Student number]\_ [assessment] \_ [assessment number].docx

For example:

12345678\_21850a\_01.docx

Assessment submission

When you are ready to submit your assessment, upload the file to OpenSpace using the Assessment Upload links in the relevant study period of your course. The Student Lounge provides a ‘Quick Guide to Uploading Assessments’ if you need further assistance. Uploading assessments to OpenSpace will enable Open Colleges to provide you with the fastest feedback and grading on your assessment. Alternatively, you can print and post your assessment to:

Open Colleges

PO Box 1568

Strawberry Hills, NSW 2012

Please ensure that you use the Open Colleges Assessment Cover Sheet (available in the Student Lounge in OpenSpace). Where assessments are submitted by post, grades and feedback will be released on OpenSpace. Please note that assessments submitted by post may take up to 21 days from the date received by Open Colleges to grade and are reliant on the efficiency of the postal service.

It is important that you keep a copy of all electronic and hardcopy assessments submitted to Open Colleges.

Grading

To achieve a Pass (PA) grade for this assessment you must, at a minimum, address all the requirements specified in the assessment instructions to demonstrate your competency.

See your Student Handbook further information on grading.

Getting started

The assessments have been designed to provide evidence that demonstrates your competence in the units CUAIND402 Provide freelance services.

Your trainer will:

* answer any questions that you have about the assessment
* Assess your competence as stipulated in the unit of competency by making judgments about the evidence you have presented in line with the rules of evidence – validity, authenticity, currency and sufficiency.
* Provide feedback on the outcomes of the assessment process.

Introduction

You are required to complete one assessment for CUAIND402 Provide freelance services.

This assessment is designed to gather evidence of your competence, specifically:

* organising and completing your own work schedule
* monitoring your own work performance
* coordinating your personal skill development and learning

**Freelance services**

In this task you will be preparing and coordinating the business side of your freelance services and will work with an external client to establish and negotiate a design brief to meet their business requirements.

You will need to source a client for this task using your industry and other networks/contacts. While the client can be anyone (friends, family, existing small business, hobbyist) they need to have a business idea with specific marketing requirements. They will need to be able to liaise with you, provide feedback and report on their satisfaction at the completion of the work.

You are required to produce a quote, invoices and other financial information based on a reasonable market rate for services provided. However, your client does not have to pay these accounts and any remuneration for this task is at the discretion of the designer and the client.

Note: As you are required to evidence a range of items for this task, create an InDesign document with the key headings and insert all the relevant items of evidence as you progress. Screen shots, notes from meetings, email correspondence, thumbnails or drawings etc can all be included to evidence the requirements of the task.

There are three documents you will need for this assessment in **Appendices A-C pp.11-15 :**

Business Plan (headings)

Client Quote

Client Sign Off

as well as three documents that can be located in **Additional Resources Module 17** in your course:

AGDA Client Terms and Conditions

Business Plan \_AusGov

Project Timeline

**Task 1 – Business plan**

Before you work with a client, you will need to establish a strategy for handling the myriad of business requirements for working with a client as a freelancer. A template with key headings has been provided in **Appendix A** and an example business plan can be found in Additional Resources Module 17.

This task requires a strategic plan for your freelance services including a viable commercial fee structure based on your outgoings. (You may allocate a portion of your home as office space).

Deliverables:

* PDF Business plan with key headings

**Task 2 – Scope and contract**

Having sourced a potential client you will need to hold a preliminary meeting to determine the requirements of the project and the final deliverables. You will need to negotiate with your client on the scope, terms and/or conditions. From this meeting and resulting communications, you will need to document and create the following:

**For the client**

1. Project scope. Create a client letter that defines the scope of the project. (This includes all the deliverables. For example, logo, brand book, website). You are required to produce a minimum of two items for your client. You will need to negotiate the scope of the work based on your professional opinion of what is required for the client.
2. Project estimate: Prepare a professional estimate for the design services including timing. You can find a Client Quote template in **Appendix B**.
3. Client sign off to the project scope (email) See Client Sign Off template in **Appendix C.**
4. Client Contract including key dates, price, deposit, deliverables. Use the AGDA sample that can be found in Additional Resources Module 17.

**Your project planning and business requirements**

1. **Project timeline**

Incorporate key task dates ie client meeting, client concepts, client feedback, project deliverables. Also include the payment dates. Include the deposit, and any partial payments negotiated throughout the work period. Then the final payment date.

Use the Excel spreadsheet Project Timeline provided in Additional Resources Module 17.

1. **Project budget** including all expenses (cost of fonts or other stock images, website storage, printing costs etc) include tax payable on income earned from the job (Use Excel or other tabulated document)

**Task 3 – Project research, ideas, concept workshop, design brief and feedback**

In this stage of the task you will source information on graphic design trends and analyse the trends with consideration to your client project. You will use critical and creative thinking to develop conceptual ideas and to present them to your client. You will workshop the ideas with your client, noting relevant feedback before developing the concepts to a finished stage. You will need to document the following:

1. Graphic design trend analysis (provide evidence). Consider style, societal and technology based trends.
2. Market research. Research the business, industry, competitors.
3. Critical and creative thinking techniques, client workshop to produce design brief and concepts.
4. Create thumbnails of concepts as agreed (usually three different initial concepts for a client to choose from).
5. Client meeting to discuss concepts and seek feedback. This may take the form of meeting notes and emails confirming feedback. Ask your client to sign off on the concepts before proceeding – (adapt the client sign off template provided).

**Task 4 – Finished work and client feedback**

In this stage of the project you are creating the client work, liaising and seeking feedback on any amendments to produce artwork appropriate for final output. You will need to seek client confirmation and sign off on the final concepts. You will need to document the following:

1. Client communications including emails, meeting notes
2. Client approval and sign off. (You will need to create a sign off template for your client)
3. PDF of finished works or URL of website where relevant. If they are documents for print they need to be print ready and if digital, they need to be digital ready. Consider things like colour space, crop marks, printer marks, file type and size etc.
4. Client feedback form – Ask your client to complete the provided feedback form to assess both your performance as a professional designer and their satisfaction with the work you have provided
5. Final client tax invoice

**Task 5 Project archiving and reflection**

In this stage you will reflect on both the process you have undertaken and the final work you have created including safe work practices, legal and intellectual property considerations. You will also consider your skills and any professional development required based on your performance and earlier research regarding design trends. Finally, you will consider work/life balance.

1. Evaluate legal considerations for the project and for your role as the designer
2. Describe the intellectual property considerations considered during the project and in general as a designer
3. Describe the safe work practices you have utilised throughout the production of the project
4. Set up and create archives for the work you have created and for the financials of the project. Back-up these files to a safe location. Evidence can be provided through screenshots of your computer filing system.
5. Questions for reflection:
	1. What could I do better? What worked? How can I build on this?
	2. Was the work successful? Did it achieve its objectives? Was it implemented in the best way?
	3. What have I learnt? What was surprising? What challenged me?
	4. Has the process of preparing a client job enhanced my understanding of the process in any way?
	5. Have any techniques or ideas that are new to me proven to be an unexpectedly useful tool?
	6. Have any of the techniques or ideas stood out to me as a key element of the process?
	7. Are there any techniques, ideas I know of that I could not access, but I feel would have been of advantage?
	8. How have current or emerging trends directed the development of the design?
	9. Do you like or dislike the final work? Why?
	10. List contributors to your quality of life, artistic and commercial goals for example: time with spent with family, health, fitness, mental well-being, social or community involvement, creative fulfilment, potential project profit. Reflect on your work throughout the project and review whether your quality of life has been balanced against your work objectives. Have you been able to achieve balance? If not, why? How might you address this?

**Checklist**

The learner must complete and submit the following:

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| **33552/01:** |
| **Task 1** Completed Business plan | [ ]  |
| **Task 2** Scope and contractClient side: * Project Scope (should include items to be designed and timeline)
* Estimate
* Sign off (Client sign-off on scope and estimate)
* Contract (Client contract as per the AGDA sample provided)

Business documents: * Project timeline (as per the sample provided)
* Project budget/costing (as per the sample provided)
 | [ ]  |
| **Task 3** Project Research* Trend analysis
* Market research
* Critical and creative thinking techniques
* Concept thumbnails
* Record of client meeting
* Client sign off - final concept
 | [ ]  |
| **Task 4** Finished work client feedback* Client communications
* Client sign off
* PDF/Screenshots of finished works
* Completed client feedback form
* Client tax invoice
 | [ ]  |
| **Task 5** Project archiving screenshots and reflection (Word doc) | [ ]  |

**APPENDIX A**

**Business plan - Key headings**

1.0 Executive Summary

### 1.1 Objectives

### 1.2 Mission

## 2.0 Company Summary

### 2.1 Company Ownership

### 2.2 Start-up Summary

## 3.0 Services

## 4.0 Market Analysis Summary

### 4.3 SWOT

### 4.1 Market Segmentation

### 4.2 Target Market Segment Strategy

## 5.0 Strategy and Implementation Summary

### 5.1 Marketing Strategy

### 5.2 Sales Strategy

### 5.2.1 Sales Forecast

### 5.3 Competitive Edge

## 6.0 Financial Plan

### 6.1 Break-even Analysis

### 6.2 Projected Profit and Loss

### 6.3 Projected Cash Flow

### 6.4 Projected Balance Sheet

Ref: <http://www.bplans.com/graphic_design_business_plan/executive_summary_fc.php>

**APPENDIX B**

**Client Quote – This should be produced on company letterhead**

*[Your freelance business name*] will design, produce and deliver the

agreed range of final artwork files for *[client business name],* according to your brief.

As part of this service, I will *[items may include – list as per the agreed scope negotiated with your client]*:

* liaise with your printer/s
* liaise with your manufacturers
* register website URL
* register domain name
* coordinate the print production process through to delivery
* procure all deliverables outlined in the brief
* store and maintain all artwork files\* for future use

**Payment schedule**

[*Your freelance business name*] will invoice [*client name]* after the contract negotiation, a retainer fee of 30% of the total fees quoted. Upon receipt of payment, all components will follow as estimated on the production schedule below.

Outsourced contractor costs will be quoted upon notification of *[quantities or as services are determined*] required. These fees are required at the time of order placement, prior to *[printing/ordering etc*].

Payment of the remaining *[70% or as per your progress payment schedule]* of the total fees will be required upon delivery of [insert any progress or other payments).

*You may like to include preferred payment methods. IE Preferred payment methods include direct deposit, cash or credit card*

\*The Copyrights to all digital artwork files bearing the [*Client]* brand will automatically transfer from *[Your freelance business name]* to *[Client business name]* upon receipt of full payment.

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| **DELIVERABLES** |
| **Product/Service** | **Component** | **Timing** | **Deliverable** |
| Concept workshop | Face to face workshop to brainstorm concepts, objectives, strategies | 1 week from initial meeting | Design brief sign off |
| 3 concepts | Face to face concept presentation of ideas | 2 weeks from workshop | Concept sign off |
| Refined concept | Face to face concept presentation*[Specify what you will be presenting]* | 1 week from concept sign off | *[Specify according to the scope negotiated ie Logo, colour palette, brochure etc]* |
| Finished artwork [*or as negotiated*] | *Specify what you are providing and how you will be providing* | *Specify timing* | *Specify exactly what client receives* |
| *Any other items being delivered* |  |  |  |
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**APPENDIX C**

**Client Sign Off** – This should be produced on company letterhead

**ARTWORK APPROVAL AND SIGN OFF**

Please complete the following information and return by email [*insert your email address*] by [*insert day, date, time*]

**Project:**  *[Client project name*]

I, the undersigned, have reviewed and approve the [*artwork provided for production or work which requires sign off];*

* With the corrections as marked on the copy
* With no further changes, additions, deletions or corrections.

I hereby give approval to proceed with the final artwork *[or stage as nominated]*

I understand that further changes to the design may result in a delay to the final delivery date and may incur additional charges.

In signing this document, you are in agreement that the above work meets your specifications.

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 Client signature Client name Date