

Unit 22: Planning and Managing a Hospitality Event

Unit code:	D/601/0497
QCF Level 3:	BTEC National
Credit value:	10
Guided learning hours:	60

● Aim and purpose

The aim of this unit is to enable learners to gain knowledge of characteristics of events in the hospitality industry and gain skills to produce a proposal for an event from a client brief, plan, stage and review events.

● Unit introduction

This unit introduces learners to the planning and managing of events within the context of the hospitality industry.

Learners will have the opportunity to explore a diverse range of events, such as banquets, parties and receptions, and a variety of themes.

Learners will be expected to deliver event services as part of a practical activity. They will produce a proposal to meet a client brief, which may be supplied by the tutor. A number of possible events could be considered, such as a small end-of-term party, a reception, a garden party, a school fete, a charity fundraising activity or a themed dinner. The proposal will need to cover essential criteria, such as a description of the event, numbers involved and costs that will be incurred.

The tutor will explain the preparation for the event, enabling learners to develop their ability to plan and monitor the timescales of the project and also to practise contingency planning. Learners will explore various issues such as access, staffing and facilities. As part of their planning, learners will consider the ways in which they can evaluate the success of the event, for example by collecting feedback from customers and participants. This event will then be staged and its success reviewed.

● Learning outcomes

On completion of this unit a learner should:

- 1 Know characteristics of events in the hospitality industry
- 2 Be able to produce a proposal for an event from a client brief
- 3 Be able to plan events
- 4 Be able to stage events and review its success.

Unit content

1 Know characteristics of events in the hospitality industry

Events: types eg receptions, banquets, outdoor events, parties, promotions, fundraising; themes eg historical, 1970s, Hollywood, casino, murder mystery; trends

Characteristics: location and size of venues; decor and furnishings; equipment; staffing requirements; entertainment; food and beverages

2 Be able to produce a proposal for an event from a client brief

Client brief: purpose of event; client needs; constraints eg time, location, costs; records of communication with client eg meetings; feasibility

Proposal: date and time; description of event; numbers of attendees; duration; location; requirements eg catering, staffing, ticketing, entertainment, publicity; costs

3 Be able to plan events

Planning: according to client brief; objectives; time planning eg timelines, critical times, lead times; venue eg size, layout, decor, disabled access; number of guests; entertainment eg music, speakers, entertainers; catering requirements eg type of menu, style of service, quantities of food and drink; staffing requirements eg numbers, roles; legal constraints eg health and safety, negligence, hazardous substances, insurance requirements, fire regulations, provision of first aid; contingency arrangements; marketing and publicity; control of attendance eg invitations, guest lists, ticketing; facilities eg car parking, cloakrooms, toilets

4 Be able to stage events and review its success

Stage the event: according to proposal and plan; adapting plan as required

Review: sources of information eg numbers of attendees, client feedback, supervisor feedback; against initial proposal; against objectives; meeting needs of client and audience; ways in which success will be measured eg numbers, feedback; organisation; time management; facilities; own contribution; contribution of others eg catering, entertainment

Assessment and grading criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria for a pass grade describe the level of achievement required to pass this unit.

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
P1 describe different events and their characteristics in the hospitality industry [IE 1, 2, 3]		
P2 produce a proposal for an event using a given client brief, with tutor support [IE 2, 3, 4, 5, CT 1, 2, 3, RL 4, SM 1, 2, 3, EP 3]	M1 produce a proposal for an event, showing independent research skills and justifying their suggestions	D1 evaluate the original proposal and the planning and management of the event, making suggestions for improvements.
P3 plan an event, according to the client brief and proposal [IE 2, 3, 4, 5, CT 1, 2, 3, RL 4, SM 1, 2, 3, EP 3]	M2 show a high level of independence and skills when planning and staging an event	
P4 stage an event P5 review how successful the event has been. [IE 2, 3, 4, 5, CT 1, 2, 3, RL 4, SM 1, 2, 3, EP 3]	M3 produce a review analysing how successful the event has been.	

PLTS: This summary references where applicable, in the square brackets, the elements of the personal, learning and thinking skills applicable in the pass criteria. It identifies opportunities for learners to demonstrate effective application of the referenced elements of the skills.

Key	IE – independent enquirers CT – creative thinkers	RL – reflective learners TW – team workers	SM – self-managers EP – effective participators
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Essential guidance for tutors

Delivery

Learners will need an understanding of the hospitality industry before they do this unit.

The unit begins with an overview of the types of events in the hospitality industry and their characteristics, for example a celebration (eg prize giving), parents' evening, charity fundraising event. This could be introduced with a class discussion of different types of event, followed up with visits to local event providers, input from industrial speakers, and active text and internet research.

A given client brief will be required in order for learners to produce a proposal. This could be a real brief or produced by the tutor acting as the client. Learners could manage a small event alone or be allocated a particular area to manage within a larger event that allows them to meet all the grade criteria. Events that might be appropriate are small parties for christenings and birthdays, end-of-term college parties, formal receptions, garden parties, school fetes, charity fundraising activities, themed dinners or business breakfasts.

When considering planning requirements, the range of possible services that could be provided for the client needs to be discussed, for example venue searches, the hire of temporary structures for external events, audiovisual system hire, entertainment system hire, photographers, florists, printing, catering specialists, additional legislative controls, eg licensing laws for the sale of liquor, music and dancing, public liability insurance. This will introduce the major concepts and enable learners to explore ideas and collect materials. Recent advances in technology should be explored and the methods employed by organisations will need to be addressed in the research aspects of the programme and collect materials.

The Event Safety Guide (HMSO) provides additional support and outlines specific health and safety requirements.

Outline learning plan

The outline learning plan has been included in this unit as guidance and can be used in conjunction with the programme of suggested assignments.

The outline learning plan demonstrates one way in planning the delivery and assessment of this unit.

Topic and suggested assignments/activities and/assessment
Introduction to the unit and the programme of learning.
Learners interview hospitality employers and find out the different types of events they may hold.
Learners visit a hospitality event management business and find out about the characteristics of different types of events.
Assignment 1 – Characteristics of Events in the Hospitality Industry (P1)
Learners produce a booklet about the characteristics of different types of events in the hospitality industry.
Group discussion to determine understanding of client briefs.
Visit to an event management business and observation of a client brief being implemented – follow-up poster showing different types of client brief.
Learners interview a member of staff from their own institution on event proposal.
Visit to an event management business to look at event proposals.
Assignment 2 – Production of a Proposal for an Event from a Client Brief (P2, M1, D1)
Learners create a presentation of an event proposal.
Role play of planning events – learners identify key planning considerations.
Role play of planning events – learners get feedback from others.
Assignment 3 – Planning an Event (P3, M2)
Learners create a presentation of an event plan.
Role play of staging events – learners follow the proposal and plan and adapt as required.
Role play of reviewing events.
Assignment 4 – Staging an Event and Reviewing Its Success (P4, P5, M3)
Based on staging an event and reviewing its success.
Tutorial support and feedback.
Self-initiated learning time.

Assessment

Any evidence submitted for criteria requiring the practical demonstration of skills, eg role plays or the ability to work independently, must be supported by observation sheet(s) signed by the assessor and identify how specific criteria have been met.

The sub-headings in this section mirror the funnelling opportunities in the grading grid. They suggest how assessment can be grouped to allow learners to progress to the higher grades; however, they are not prescriptive.

For P2, P3 and P4, learners may work in groups. However, each learner must present their own evidence and the contribution that each learner has made to the group work must be clear (supported where possible by tutor observation sheets).

P1

To achieve P1, learners are expected to carry out research about the different types of event and describe at least four different types of event and the typical features of each one, with real examples.

P2 – M1 – D1

For P2, learners need to use a given client brief and produce a proposal for an event. The client brief could be real or it could be produced by the tutor. The type of event will determine exactly what is produced, but could include information about the location and venue, costs, decorations, menu, service styles, and entertainment. At pass level it is expected that learners will require tutor support in producing their proposal, and it should be presented in an appropriate format, which could be a written or oral presentation. It is important that learners show that the proposal is feasible within the constraints of the situation, such as costs, time and facilities.

For M1, the proposal produced should show evidence of independent research into the possible ways of fulfilling the brief, such as how other similar events have proved to be successful. Learners need to justify the suggestions made and should require minimal tutor support.

For D1, learners should produce an evaluation that synthesises the three stages of the event: the original proposal, the planning, and the staging. Learners should identify ways in which each of these contributed to, or hindered, the success of the event for the client, the audience, and other participants. Learners should reflect on their own performance and suggest ways in which it could be improved, both in terms of what they would do differently in future, but also gaps in their skills and knowledge that need to be remedied, eg more detailed cost planning skills, better team management skills or better time-management skills.

P3 – M2

To achieve P3, learners need to use the client brief and their proposal and plan the event. The exact requirements will vary depending on the type and scale of the event chosen, but learners need to cover all the areas that they suggested within their proposal, and justify any changes and agree them with the client. Learners need to set objectives for the event and plan and monitor the timescales of the project. Learners should also plan for contingencies, and consider how they will evaluate the success of the event. However, the contingency planning may be fairly basic, and it is likely that the original timescales will require amendment. Depending on the nature of the event, learners may require significant tutor support in ensuring that staffing, liaison, material requisitioning and funding needs are met.

M2 can be differentiated from P3 and P4 by the level of skills and independence shown. Tutor input should be minimal, and learners need to draw up and monitor realistic and effective timelines. At this level there should be more evidence of contingency planning (eg adverse weather arrangements, additional staff available, additional sources of materials and equipment).

P4 – P5 – M3

To achieve P4, learners need to participate as organiser and manager for their allocated area of responsibility.

For P5, learners must review what took place in the event. This review should consider the extent to which the plans were successfully implemented, and their own and others' performance. Evidence should come from their own experience and also from other sources, as originally planned, such as from customer feedback forms and feedback from staff. The evidence for P4 and P5 will come mainly from the review, rather than from participation in the event.

M3 builds on P4 and P5 but at merit level, as well as considering the aspects of the event that were and were not successful, learners need to analyse why this was the case.

Programme of suggested assignments

The table below shows a programme of suggested assignments that cover the pass, merit and distinction criteria in the assessment and grading grid. This is for guidance and it is recommended that centres either write their own assignments or adapt any Edexcel assignments to meet local needs and resources.

Criteria covered	Assignment title	Scenario	Assessment method
P1	Characteristics of Events in the Hospitality Industry	Learners take the role of a HR manager at a conference centre and are required to prepare a booklet for new staff on different types of hospitality events.	Learners prepare a booklet for new staff.
P2, M1, D1	Production of a Proposal for an Event from a Client Brief	Learners continue in the same role of HR manager and are required to produce a presentation for a client.	Learners prepare a presentation and supporting materials for the client.
P3, M2	Planning an Event	Learners continue in the same role of HR manager and are required to plan a hospitality event.	Learners create a plan that meets the proposal.
P4, P5, M3	Staging an Event and Reviewing Its Success	Learners continue in the same role of HR manager and run the hospitality event they have produced a proposal for and planned and need to then review it.	Role play or work placement supported by observation sheets. Learners produce a report reviewing the event.

Links to National Occupational Standards, other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *BTEC Hospitality* suite. This unit has particular links with the following unit titles in the Hospitality suite:

Level 2	Level 3
Principles of Customer Service in Hospitality, Leisure, Travel and Tourism	Principles of Supervising Customer Service Performance in Hospitality, Leisure, Travel and Tourism
Providing Customer Service in Hospitality	Providing Customer Service in Hospitality
Planning and Running a Hospitality Event	Supervisory Skills in the Hospitality Industry
Service of Food at Table	Events Organisation in Hospitality
Service of Alcoholic and Non-Alcoholic Drinks	

Essential resources

If real client briefs are not available, then the tutor will be required to develop a range of simple client briefs. Learners must have access to the resources required to plan and manage their event, including banqueting event proformas.

Employer engagement and vocational contexts

Links with local employers should be developed to enable tutors to put the unit into a vocational context. Where possible, visits could be made to local hospitality businesses for learners to gain specific information for this unit. Speakers from the hospitality industry can be asked into the centre.

Indicative reading for learners

Textbooks

Shone A and Parry B – *Successful Event Management, 2nd Edition* (Thomson Learning, 2004) ISBN 9781844800766

Torkildsen G – *Leisure and Recreation Management, 5th Edition* (Routledge, 2005) ISBN 9780415309967

Van Der Wagen L – *Event Management, 3rd Edition* (Pearson, 2008) ISBN 9780733988806

Journals

Caterer and Hotelkeeper – Reed Business Information

Event Magazine – Haymarket Publications

Websites

www.bha.org.uk

British Hospitality Association

www.catersource.com

Catersource – Education, products and news for caterers

www.people1st.co.uk

People 1st – Sector Skills Council for Hospitality, Leisure, Travel and Tourism

Delivery of personal, learning and thinking skills

The table below identifies the opportunities for personal, learning and thinking skills (PLTS) that have been included within the pass assessment criteria of this unit.

Skill	When learners are ...
Independent enquirers	<p>P1 describe different events and their characteristics in the hospitality industry [IE 1, 2, 3]</p> <p>P2 produce a proposal for an event using a given client brief, with tutor support [IE 2, 3, 4, 5]</p> <p>P3 plan an event, according to the client brief and proposal [IE 2, 3, 4, 5]</p> <p>P4 stage an event [IE 2, 3, 4, 5]</p> <p>P5 review how successful the event has been [IE 2, 3, 4, 5]</p>
Creative thinkers	<p>P2 produce a proposal for an event using a given client brief, with tutor support</p> <p>P3 plan an event, according to the client brief and proposal</p> <p>P4 stage an event</p> <p>P5 review how successful the event has been [CT 1, 2, 3]</p>
Reflective learners	<p>P2 produce a proposal for an event using a given client brief, with tutor support</p> <p>P3 plan an event, according to the client brief and proposal</p> <p>P4 stage an event</p> <p>P5 review how successful the event has been [RL 4]</p>
Self-managers	<p>P2 produce a proposal for an event using a given client brief, with tutor support</p> <p>P3 plan an event, according to the client brief and proposal</p> <p>P4 stage an event</p> <p>P5 review how successful the event has been [SM 1, 2, 3]</p>
Effective participators	<p>P2 produce a proposal for an event using a given client brief, with tutor support</p> <p>P3 plan an event, according to the client brief and proposal</p> <p>P4 stage an event</p> <p>P5 review how successful the event has been [EP 3].</p>

Although PLTS are identified within this unit as an inherent part of the assessment criteria, there are further opportunities to develop a range of PLTS through various approaches to teaching and learning.

Skill	When learners are ...
Independent enquirers	producing a detailed record of the event planning process, explaining any deviations from the original plan [IE 6]
Reflective learners	reviewing the planning and organisation of the event, including own role, and making recommendations on how these could be improved [RL 1]
Effective participators	making recommendations for improving the success of a hospitality event based on feedback collected from a variety of sources, including the success of the promotional materials used [EP 4].

● Functional Skills – Level 2

Skill	When learners are ...
ICT – Use ICT systems	
Select, interact with and use ICT systems independently for a complex task to meet a variety of needs	
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	
Manage information storage to enable efficient retrieval	
Follow and understand the need for safety and security practices	
Troubleshoot	
ICT – Find and select information	
Select and use a variety of sources of information independently for a complex task	
Access, search for, select and use ICT-based information and evaluate its fitness for purpose	planning an event, according to the client brief and proposal
ICT – Develop, present and communicate information	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> • text and tables • images • numbers • records 	
Bring together information to suit content and purpose	
Present information in ways that are fit for purpose and audience	
Evaluate the selection and use of ICT tools and facilities used to present information	
Select and use ICT to communicate and exchange information safely, responsibly and effectively including storage of messages and contact lists	

Skill	When learners are ...
Mathematics	
Understand routine and non-routine problems in a wide range of familiar and unfamiliar contexts and situations	
Identify the situation or problem and the mathematical methods needed to tackle it	
Select and apply a range of skills to find solutions	
Use appropriate checking procedures and evaluate their effectiveness at each stage	
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations	
Draw conclusions and provide mathematical justifications	reviewing the success of an event
English	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	discussing the characteristics of different events producing a proposal for an event
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively	producing reports.