

Pearson BTEC Level 3 Certificate in the Principles of Event Management

Specification

BTEC Specialist qualification

First teaching August 2014

Issue 3

Edexcel, BTEC and LCCI qualifications

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This specification is Issue 3. Key changes are listed in summary table on next page. We will inform centres of any changes to this issue. The latest issue can be found on the Pearson website: qualifications.pearson.com

This qualification was previously known as:

Pearson BTEC Level 3 Certificate in the Principles of Event Management (QCF)

The QN remains the same.

References to third party material made in this specification are made in good faith. Pearson does not endorse, approve or accept responsibility for the content of materials, which may be subject to change, or any opinions expressed therein. (Material may include textbooks, journals, magazines and other publications and websites.)

All information in this specification is correct at time of publication.

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Summary of Pearson BTEC Level 3 Certificate in the Principles of Event Management specification Issue 3 changes

Summary of changes made between previous issue and this current issue	Page/section number
All references to QCF have been removed throughout the specification	Throughout
Definition of TQT added	Section 1
Definition of sizes of qualifications aligned to TQT	Section 1
TQT value added	Section 2
Reference to credit transfer within the QCF removed	Section 5
QCF references removed from unit titles and unit levels in all units	Section 12
Guided learning definition updated	Section 12

Earlier issue(s) show(s) previous changes.

If you need further information on these changes or what they mean, contact us via our website at: qualifications.pearson.com/en/support/contact-us.html.

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Purpose of this specification

The purpose of a specification as defined by Ofqual is to set out:

- the qualification's objective
- any other qualification that a learner must have completed before taking the qualification
- any prior knowledge, skills or understanding that the learner is required to have before taking the qualification
- units that a learner must have completed before the qualification will be awarded and any optional routes
- any other requirements that a learner must have satisfied before they will be assessed or before the qualification will be awarded
- the knowledge, skills and understanding that will be assessed as part of the qualification (giving a clear indication of their coverage and depth)
- the method of any assessment and any associated requirements relating to it
- the criteria against which the learner's level of attainment will be measured (such as assessment criteria)
- any specimen materials
- any specified levels of attainment.

1 Introducing Pearson BTEC Specialist qualifications

BTEC Specialist qualifications are work-related qualifications available from Entry to Level 3 in a range of sectors. They give learners the knowledge, understanding and skills they need to prepare for employment in a specific occupational area. The qualifications also provide career development opportunities for those already in work. The qualifications may be offered as full-time or part-time courses in schools or colleges. Training centres and employers may also offer these qualifications.

Sizes of Specialist qualifications

For all regulated qualifications, we specify a total number of hours that learners are expected to undertake in order to complete and show achievement for the qualification – this is the Total Qualification Time (TQT). The TQT value indicates the size of a qualification.

Within the TQT, we identify the number of Guided Learning Hours (GLH) that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

As well as guided learning, there may be other required learning that is directed by tutors or assessors. This includes, for example, private study, preparation for assessment and undertaking assessment when not under supervision, such as preparatory reading, revision and independent research.

As well as TQT and GLH, qualifications can also have a credit value – equal to one tenth of TQT, rounded to the nearest whole number.

TQT and credit values are assigned after consultation with users of the qualifications.

BTEC Specialist qualifications are available in the following sizes:

- Award – a qualification with a TQT value of 120 or less (equivalent to a range of 1–12 credits)
- Certificate – a qualification with a TQT value in the range of 121–369 (equivalent to a range of 13–36 credits)
- Diploma – a qualification with a TQT value of 370 or more (equivalent to 37 credits and above).

2 Qualification summary and key information

Qualification title	Pearson BTEC Level 3 Certificate in the Principles of Event Management
Qualification Number (QN)	601/1128/8
Regulation start date	29/08/2013
Operational start date	01/08/2014
Approved age ranges	16-18 19+
Credit value	30
Assessment	Centre-devised assessment (internal assessment)
Total Qualification Time (TQT)	300
Guided learning hours	192
Grading information	The qualification and units are at pass grade.
Entry requirements	No prior knowledge, understanding, skills or qualifications are required before learners register for this qualification. However, centres must follow the Pearson Access and Recruitment policy (<i>see Section 10 Access and recruitment</i>)

Qualification number and qualification title

Centres will need to use the Qualification Number (QN) when they seek public funding for their learners. The qualification title, unit titles and QN are given on each learner's final certificate. You should tell your learners this when your centre recruits them and registers them with us. There is more information about certification in our *UK Information Manual*, available on our website, qualifications.pearson.com

Objective of the qualification

The Pearson BTEC Level 3 Certificate in the Principles of Event Management is for learners who work in, or want to work within, the area of event venues, events organisation or events exhibitions.

It gives learners the opportunity to:

- develop knowledge related to the events industry, planning events, health and safety, setup and breakdown, managing the running of events, evaluation and reporting and working relationships
- achieve a nationally-recognised Level 3 qualification.

Relationship with previous qualifications

This qualification is a replacement for the EDI Level 3 Certificate in the Principles of Event Management

Progression opportunities through Pearson qualifications

Learners who have achieved the Pearson BTEC Level 3 Certificate in the Principles of Event Management can progress to the Pearson Edexcel Level 3 NVQ Diploma in Event Management or towards professional and higher-level qualifications.

Industry support and recognition

This qualification is supported by People 1st, the Skills Council for hospitality, passenger transport, travel and tourism.

Relationship with National Occupational Standards

This qualification relates to the National Occupational Standards in Event Management and Temporary Structures. The mapping document in *Annexe A* shows the links between the units within this qualification and the National Occupational Standards.

3 Qualification structure

Pearson BTEC Level 3 Certificate in the Principles of Event Management

The learner will need to meet the requirements outlined in the table below before Pearson can award the qualification.

Minimum number of credits that must be achieved	30
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Unit	Unit reference number	Mandatory units	Level	Credit	Guided learning hours
1	L/600/8549	Understanding the Events Industry	3	3	19
2	F/600/8550	Understanding how to Research and Report Information to Plan and Organise an Event	3	4	24
3	J/600/8551	Understanding Operational Event Planning	3	4	25
4	L/600/8552	Understanding Health, Safety and Security at Events Sites	4	5	40
5	R/600/8553	Understanding Event Setup and Breakdown	3	3	17
6	Y/600/8554	Understanding How to Manage the Running of an Event	4	4	25
7	D/600/8555	Understanding Event Evaluation and Reporting	3	3	18
8	H/600/8556	Understanding Working Relationships in the Events Industry	3	4	24

Centres should be aware that within the Level 3 qualification in this specification, learners will be required to meet the demands of unit(s) at Level 4. Centres are advised to consider the support, guidance and opportunities they give to learners to meet the demands of the higher level unit(s) during delivery and assessment of the qualification.

4 Assessment

The table below gives a summary of the assessment methods used in the qualification.

Units	Assessment method
All units	Centre-devised assessment

Centre-devised assessment (internal assessment)

Each unit has specified learning outcomes and assessment criteria. To pass an internally assessed unit, learners must meet all the learning outcomes. Centres may find it helpful if learners index and reference their evidence to the relevant learning outcomes and assessment criteria.

Centres need to write assignment briefs for learners to show what evidence is required. Assignment briefs should indicate clearly which assessment criteria are being targeted.

Assignment briefs and evidence produced by learners must meet any additional requirements in the *Information for tutors* section of the unit.

Unless otherwise indicated in *Information for tutors*, the centre can decide the form of assessment evidence (for example, performance observation, presentations, projects, tests, extended writing) as long as the methods chosen allow learners to produce valid, sufficient and reliable evidence of meeting the assessment criteria.

Centres are encouraged to give learners realistic scenarios and maximise the use of practical activities in delivery and assessment.

To avoid over-assessment centres are encouraged to link delivery and assessment across units.

There is more guidance about internal assessment on our website. See *Section 13. Further information and useful publications*.

5 Recognising prior learning and achievement

Recognition of Prior Learning

Recognition of Prior Learning (RPL) is a method of assessment (leading to the award of credit) that considers whether a learner can demonstrate that they can meet the assessment requirements for a unit through knowledge, understanding or skills they already possess and so do not need to develop through a course of learning.

Pearson encourages centres to recognise learners' previous achievements and experiences in and outside the workplace, as well as in the classroom. RPL provides a route for the recognition of the achievements resulting from continuous learning.

RPL enables recognition of achievement from a range of activities using any valid assessment methodology. If the assessment requirements of a given unit or qualification have been met, the use of RPL is acceptable for accrediting a unit, units or a whole qualification. Evidence of learning must be sufficient, reliable and valid.

Further guidance is available in the policy document *Recognition of Prior Learning Policy and Process*, which is on our website: qualifications.pearson.com

6 Centre resource requirements

As part of the approval process, centres must make sure that the resources requirements below are in place before offering the qualification.

- Centres must have appropriate physical resources (for example, equipment, IT, learning materials, teaching rooms) to support the delivery and assessment of the qualification.
- Staff involved in the assessment process must have relevant expertise and occupational experience.
- There must be systems in place to ensure continuing professional development for staff delivering the qualification.
- Centres must have appropriate health and safety policies in place relating to the use of equipment by learners.
- Centres must deliver the qualifications in accordance with current equality legislation. For further details on Pearson's commitment to the Equality Act 2010, please see *Section 10 Access and recruitment* and *Section 11 Access to qualifications for learners with disabilities or specific needs*. For full details on the Equality Act 2010, please go to: www.legislation.gov.co.uk

7 Centre recognition and approval centre recognition

Centres that have not previously offered Pearson qualifications need to apply for, and be granted, centre recognition as part of the process for approval to offer individual qualifications.

Existing centres will be given 'automatic approval' for a new qualification if they are already approved for a qualification that is being replaced by a new qualification and the conditions for automatic approval are met.

Guidance on seeking approval to deliver Pearson BTEC qualifications is available at qualifications.pearson.com

Approvals agreement

All centres are required to enter into an approval agreement that is a formal commitment by the head or principal of a centre to meet all the requirements of the specification and any associated codes, conditions or regulations. Pearson will act to protect the integrity of the awarding of qualifications. If centres do not comply with the agreement, this could result in the suspension of certification or withdrawal of approval.

8 Quality assurance of centres

Quality assurance is at the heart of vocational qualifications. The centre assesses Pearson BTEC qualifications. The centre will use quality assurance to make sure that their managers, internal verifiers and assessors are standardised and supported. Pearson use quality assurance to check that all centres are working to national standards. It gives us the opportunity to identify and provide support, if needed, to safeguard certification. It also allows us to recognise and support good practice.

For the qualifications in this specification, the Pearson quality assurance model will follow one of the processes listed below.

- 1 Delivery of the qualification as part of a BTEC apprenticeship ('single click' registration):
 - an annual visit by a Standards Verifier to review centre-wide quality assurance systems and sampling of internal verification and assessor decisions
- 2 Delivery of the qualification outside the apprenticeship:
 - an annual visit to the centre by a Centre Quality Reviewer to review centre-wide quality assurance systems
 - Lead Internal Verifier accreditation. This involves online training and standardisation of Lead Internal Verifiers using our OSCA platform, accessed via Edexcel Online. Please note that not all qualifications will include Lead Internal Verifier accreditation. Where this is the case, we will annually allocate annually a Standards Verifier to conduct postal sampling of internal verification and assessor decisions for the Principal Subject Area.

For further details, go to the *UK BTEC Quality Assurance Handbook* [on](#) our website.

9 Programme delivery

Centres are free to offer the qualifications using any mode of delivery (for example full time, part time, evening only, distance learning) that meets their learners' needs. Whichever mode of delivery is used, centres must make sure that learners have access to the resources identified in the specification and to the subject specialists delivering the units.

Those planning the programme should aim to enhance the vocational nature of the qualification by:

- liaising with employers to make sure a course is relevant to learners' specific needs
- accessing and using non-confidential data and documents from learners' workplaces
- developing up-to-date and relevant teaching materials that make use of scenarios that are relevant to the sector
- giving learners the opportunity to apply their learning in practical activities
- including sponsoring employers in the delivery of the programme and, where appropriate, in the assessment
- making full use of the variety of experience of work and life that learners bring to the programme.

Centres must make sure that any legislation taught is up to date.

10 Access and recruitment

Pearson's policy regarding access to our qualifications is that:

- they should be available to everyone who is capable of reaching the required standards
- they should be free from any barriers that restrict access and progression
- there should be equal opportunities for all those wishing to access the qualifications.

Centres are required to recruit learners to Pearson BTEC Specialist qualifications with integrity.

Applicants will need relevant information and advice about the qualification to make sure it meets their needs.

Centres should review the applicant's prior qualifications and/or experience, considering whether this profile shows that they have the potential to achieve the qualification.

For learners with disabilities and specific needs, this review will need to take account of the support available to the learner during teaching and assessment of the qualification. The review must take account of the information and guidance in *Section 11 Access to qualifications for learners with disabilities or specific needs*.

Learners may be aged between 14 and 16 and therefore potentially vulnerable. Where learners are required to spend time and be assessed in work settings, it is the centre's responsibility to ensure that the work environment they go into is safe.

11 Access to qualifications for learners with disabilities or specific needs

Equality and fairness are central to our work. Pearson's Equality Policy requires all learners to have equal opportunity to access our qualifications and assessments. It also requires our qualifications to be awarded in a way that is fair to every learner.

We are committed to making sure that:

- learners with a protected characteristic (as defined by the Equality Act 2010) are not, when they are undertaking one of our qualifications, disadvantaged in comparison to learners who do not share that characteristic
- all learners achieve the recognition they deserve from undertaking a qualification and that this achievement can be compared fairly to the achievement of their peers.

Learners taking a qualification may be assessed in British sign language or Irish sign language where it is permitted for the purpose of reasonable adjustments.

Further information regarding Access Arrangements can be found in the Joint Council for Qualifications (JCQ) document *Access Arrangements, Reasonable Adjustments and Special Consideration for General and Vocational qualifications*. Further details on how to make adjustments for learners with protected characteristics are given in the *Supplementary Guidance for Reasonable Adjustment and Special Consideration in Vocational Internally Assessed Units*.

The documents are on our website at qualifications.pearson.com

12 Units

Units have the following sections.

Unit title

This is the formal title of the unit that will appear on the learner's certificate.

Unit reference number

Each unit is assigned a unit reference number that appears with the unit title on the Register of Regulated Qualifications.

Level

All units and qualifications have a level assigned to them. The level assigned is informed by the level descriptors by Ofqual, the qualifications regulator.

Credit value

When a learner achieves a unit, they gain the specified number of credits.

Guided learning hours

Guided Learning Hours (GLH) is the number of hours that a centre delivering the qualification needs to provide. Guided learning means activities that directly or immediately involve tutors and assessors in teaching, supervising, and invigilating learners, for example lectures, tutorials, online instruction and supervised study.

Unit aim

This gives a summary of what the unit aims to do.

Essential resources

This section lists any specialist resources needed to deliver the unit. The centre will be asked to make sure that these resources are in place when it seeks approval from Pearson to offer the qualification.

Learning outcomes

The learning outcomes of a unit set out what a learner knows, understands or is able to do as the result of a process of learning.

Assessment criteria

Assessment criteria specify the standard required by the learner to achieve each learning outcome.

Unit amplification

This section clarifies what a learner needs to know to achieve a learning outcome.

Information for tutors

This section gives tutors information on delivery and assessment. It contains the following subsections.

- *Delivery* – explains the content’s relationship to the learning outcomes and offers guidance on possible approaches to delivery.
- *Assessment* – gives information about the evidence that learners must produce, together with any additional guidance if appropriate. This section should be read in conjunction with the assessment criteria.
- *Indicative resource materials* – lists resource materials that can be used to support the teaching of the unit, for example books, journals and websites.

Unit 1: Understanding the Events Industry

Unit reference number: L/600/8549

Level: 3

Credit value: 3

Guided learning hours: 19

Unit aim

This unit introduces learners to the events industry. It covers the considerable range of activities that fall within the scope of event management. Learners will research the various types of event, the significant range in size of events and the international nature of the industry. They will also look at how the events industry links with other industry sectors and the contribution it makes to the UK economy.

Finally, learners will investigate career pathways and evaluate the skills that can be gained through working in the events industry.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the key features of the events industry	1.1	Evaluate different concepts of what is meant by 'event'	<ul style="list-style-type: none"> □ Different concepts of an event: events can be single events, on single sites, spread over several days, held on several sites sequentially and concurrently; events that are ticketed, events that are open/non-ticketed
		1.2	Describe scope of the events industry	<ul style="list-style-type: none"> □ Range of different types of event: sport, exhibitions, charity fund raising, music concerts, music festivals, arts festivals, street parties, product launches, firework displays, automotive festivals/gatherings, antiques fairs, banquets, conferences, garden/horticultural shows, beauty and fashion shows
		1.3	Explain the contribution that the events industry makes to the UK economy and society	<ul style="list-style-type: none"> □ Current value of the UK events industry, projected growth of the industry □ How the events industry contributes to UK economy and society: through tourism, retail sales, employment of event staff, employment of contractors and sub-contractors, purchase and hire of facilities and equipment, development of innovative lighting and sound techniques and systems
		1.4	Explain the links between the events industry and other industries in the UK	<ul style="list-style-type: none"> □ Links between the events industry and other industries in the UK: security, hospitality, automotive, acoustic engineering, logistics, customer service, construction, graphic design, media, tourism, marketing, IT and communications

Learning outcomes		Assessment criteria		Unit amplification
		1.5	Explain the international nature of the events industry	<ul style="list-style-type: none"> □ International nature of the events industry: global organisations involved in the events industry; how the events industry is used to facilitate global merchandising; how events are promoted and viewed internationally; how the internet enables and encourages events to be worldwide; how cheap travel has opened access to events in remote locations
		1.6	Define the five main sectors within the events industry	<ul style="list-style-type: none"> □ Main sectors within the events industry: music and the arts; beauty, fashion and cosmetics; automotive; retail; hospitality, food and drink; sport leisure and recreation
		1.7	Describe the key features of the main sectors within the events industry	<ul style="list-style-type: none"> □ Music and the arts sector features include classical and pop concerts, music festivals, radio road shows; how the range of venues used, duration of events and audience profiles varies significantly, how severe weather affects certain types of event, the impact of this on planning □ Beauty, fashion and cosmetics sector features include the closed nature of such events, the need for seating, lighting, audio and staging, the promotional aspect of the events and the implications of it □ Automotive sector features include new product or model launches, the specific type of venue required, the implications for security, access and transport needs □ Retail, hospitality, food and drink sector features include the wide range of events and types of venues used, the equipment required, the health and safety implications, the impact on security requirements, the non-ticketing arrangements which make it difficult to predict attendance numbers □ Sport leisure and recreation sector features include regional, national and international scope of events, the duration and timing of events, the implications for security, access and transport to and from venues, the impact of severe weather

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the main functions within the events industry	2.1	Define the four main functions within the events industry	<ul style="list-style-type: none"> □ Four main functions within the events industry: meetings, incentives, conferences and conventions, and exhibitions and events
		2.2	Describe the planning and implementation cycle for events	<ul style="list-style-type: none"> □ Planning and implementation cycle for events: identify aims of event, research and identify means of delivering event aims, prepare detailed plan to achieve aims, evaluate plan, implement event plan, evaluate event □ Importance of ensuring each phase of the cycle is completed
		2.3	Evaluate the importance of each phase in the event planning and management cycle	<ul style="list-style-type: none"> □ Importance of the different phases in event planning and management: identifying aims so that success factors can be set out to judge performance and later used to evaluate the event; preparing a detailed operational plan so that key roles and responsibilities can be assigned, so that sequences of tasks can be set out and deadlines agreed; implementing the plan so that all involved can monitor progress of specific phases against deadlines, so that interventions may be made where needed to bring the plan back to target; evaluating the event so that success in meeting original aims is accurately assessed and used to plan future events

Learning outcomes		Assessment criteria		Unit amplification
3	Understand the legal, social and ethical framework for events	3.1	Identify the main areas of legislation that cover the planning and organisation of events, including health and safety and contract law	<ul style="list-style-type: none"> □ Main areas of legislation that cover the planning and organisation of events: health and safety, contract law, human resources and employment, events venue legislation
		3.2	Explain the implications of four different areas of legislation for the planning and organisation of events	<ul style="list-style-type: none"> □ Implications of different legislation for the planning and organisation of events: employment conditions for event staff, risk assessment of venues, legal responsibilities of contractors, liabilities of event staff, contractors □ How these affect how to plan for safety and wellbeing for different events at different venues
		3.3	Describe the main ethical and social issues that affect the events industry	<ul style="list-style-type: none"> □ Social and ethical issues: prioritising the welfare of those attending events over profit, ensuring staffing and facilities are adequate to maintain safety; marketing and selling ethically, taking into account local community needs, environmental impact and sustainability of resources when organising events
		3.4	Explain the implications of four different types of ethical and social concerns for the planning and organisation of events	<ul style="list-style-type: none"> □ Implications of ethical concerns: ethical merchandising such as ensuring that items on sale at the event are ethically sourced and sold; avoiding environmental impact at the venue such as damage to the site, inadequate waste control or management, noise; using sustainable resources for the event such as using recycled materials □ Social concerns: planning for the welfare of those attending the event such as providing adequate rest rooms, transport and access to the venue or a range of food that meets the needs of different ages, groups and ethnic origins; how ethical and social concerns may deter attendance or reduce time spent at the event; how concerns may create adverse publicity and impact on future events

Learning outcomes		Assessment criteria		Unit amplification
4	Understand the key features of two contrasting sectors of the events industry	4.1	Compare the purpose of two contrasting sectors of the events industry	<ul style="list-style-type: none"> How the different event sectors contrast in purpose: the main aims of the different event sectors, e.g. financial profit, technological advancement, increasing sales, attracting potential buyers and customers, changing lifestyles, influencing opinions or interest; how aims are short term and long term; how some aims overlap
		4.2	Describe the diversity of the different types of organisations that make up the events industry	<ul style="list-style-type: none"> Diverse nature of the events industry: large multi-national organisations, e.g. automotive, beauty and fashion, sports governing bodies; small organisations working at a local or regional level, e.g. food producers; community groups; organisations that provide support or services for events, e.g. catering, security, transport, special effects, marketing and promotion, ticketing and sales
		4.3	Compare the economic and social value of two contrasting sectors of the events industry	<ul style="list-style-type: none"> How the different sectors contrast in economic and social value; how the different sectors contribute economically, e.g. through employing people, taxable profits, purchasing supplies, employing contractors and sub-contractors, generating income for local community businesses, increasing take-up and use of venues and facilities; how the different sectors contribute socially, e.g. through creating local interest in venues or events, through highlighting local needs, through improving access to venues and their surroundings
		4.4	Explain factors driving change in two contrasting sectors	<ul style="list-style-type: none"> Factors driving change in the different sectors: demand for live events, increase in small scale events, greater specialism of events, the need for more effective merchandising at events, ethical and environmental factors influencing attendance at events How these factors impact on the different event sectors

Learning outcomes		Assessment criteria		Unit amplification
		4.5	Describe the typical range of events that take place in two contrasting sectors	<ul style="list-style-type: none"> □ Typical range of events in the sectors: music and the arts sector, e.g. classical and pop concerts, music festivals, radio road shows; beauty, fashion and cosmetics, e.g. road shows, promotions, exhibitions, product launches; automotive, e.g. shows, displays, competitions, product launches; retail, hospitality, food and drink, e.g. festivals, banquets, product launches, exhibitions; sport recreation and leisure, e.g. sports matches, tournaments, marathons, conferences, community events, firework displays
		4.6	Explain the roles of key organisations in two contrasting sectors, including any representative and regulatory bodies and trade associations	<ul style="list-style-type: none"> □ Roles of key organisations, representative and regulatory bodies and trade associations: The Association of British Professional Conference Organisers, Association of Event Organisers, Meeting Industry Association, Association for Conferences and Events, Event and Entertainment Management Association, IMEX, ICCA, HSE, Local Authorities, Sports Governing Bodies, Security Industry Authority
		4.7	Explain the links that two contrasting sectors in the industry have with other industries	<ul style="list-style-type: none"> □ Links between the various events sectors and other industries: security, hospitality, automotive, acoustic engineering, logistics, customer service, construction, graphic design, media, tourism, marketing and retail

Learning outcomes		Assessment criteria		Unit amplification
5	Understand employment and career opportunities in the events industry	5.1	Evaluate three sources of reliable and relevant information on career progression, training and education in the events industry	<ul style="list-style-type: none"> □ Sources of reliable and relevant information on career progression, training and education in the events industry: the National Careers Service, Guardian Careers, Event Jobsearch, local Colleges and Universities □ Range of training and qualification courses available locally, nationally, internationally
		5.2	Describe potential career pathways in the five different sectors within the events industry	<ul style="list-style-type: none"> □ Potential career pathways in the different sectors within the events industry: what experience is required for entry-level jobs in the different sectors, what progression can be expected; the typical salary ranges for different levels in the industry; the value of voluntary and part-time jobs in gaining experience; what event organisers look for in terms of qualities, expertise and experience for event staff; what additional training, skills and qualities may be required to progress in the events industry
		5.3	Identify the qualities, expertise and experience required to progress in the events industry	<ul style="list-style-type: none"> □ Qualities, expertise and experience required to progress in the events industry include project management, time management and multi-tasking, team working, planning and organisation, marketing and promotion, effective communications, problem solving, working to financial targets, meeting deadlines, decision making, remaining calm under pressure
		5.4	Explain how skills and knowledge acquired in their sector could relate to job opportunities elsewhere	<ul style="list-style-type: none"> □ Transferable skills: how skills and knowledge acquired in event management could relate to job opportunities elsewhere, e.g. security work, marketing and promoting products, managing teams, planning and organising work schedules, e.g. in logistics or manufacturing, research work including data collection and analysis, customer service

Information for tutors

Delivery

This unit underpins all the other units in this qualification.

This unit should be delivered in a way that develops learner knowledge and understanding of effective working relationships and their value in planning and coordinating events.

Learners need to know and understand:

- the key features of the events industry – the range of activities falling within scope
- the legal, social and ethical framework for events
- the economic contribution of the industry, its projected growth nationally
- the international nature of the events industry
- key organisations and representative bodies
- possible career pathways
- the range of transferable skills that can be gained through working in the events industry

A useful opening would be through small-group discussions, during which learners can exchange their experiences of attending different events, for example music festival or concert – indoor/outdoor, sports event – indoor/outdoor, single or multiple locations, banquet, presentation, public meeting etc both in this country and overseas. The discussion should focus on how the events were managed, the role of the events organiser and how they feel the events could have been improved. Aspects of the events such as security, size and suitability of venue, facilities, transport, social, ethical and environmental issues should be considered. Tutors can take feedback on a flipchart or board and then share the findings of individual groups.

Assignments or case studies could include researching the range of events held within a 50-mile radius of the learner's home over a period of six months, categorising these and summarising the key factors – size, type, client group, venue – that would have been part of the planning process for one or more of the events. Learners should then be encouraged to look at two contrasting events, comparing how these are staged and managed. Specific attention should be paid to the social, ethical and environmental factors for these. The different roles of event organisers, security professionals, local authority officers, emergency services officers and suppliers should be explored. This could be enhanced, for example through watching video footage of events or listening to event professionals.

This research could be presented via presentation and include an evaluation against possible critical success factors for the event and options for improvement.

Knowledge of the events management industry will be enhanced through active involvement. Wherever possible, learners should have the opportunity to work with event management professionals or those involved in events so that they can experience the different aspects and how these contribute to the overall operation of the event. This could be as an event volunteer or through work shadowing.

Assessment

Learners must meet all assessment criteria to pass the unit.

The predominant source of evidence for this unit is likely to be the case study/assignment and research as outlined above.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. These should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of knowledge and understanding in a work-related setting.

Suggested resources

Textbooks

Bowdin G, Allen J, O'Toole W, Harris R, McDonnell I – *Events Management* (Routledge, 3rd edition, 2011) ISBN 978-1-85617-818-1

Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013) ISBN 978-1-11859-112-3

Gaur S – *Event Marketing and Management* (Vikas Publishing House, 2009) ISBN 978-8-12591-449-5

Goldblatt J – *Special Events: Best Practices in Modern Event Management* (Van Nostrand Reinhold, 2nd edition, 1997) ISBN 0-442-02207-7

HSE – *Event Safety Guide* (HSE, 1999) ISBN 978-0-71762-453-9

HSE – *Guide to Risk Assessment* (HSE, 2011) ISBN 978-0-71766-440-5

HSE – *Managing Crowds Safely: A Guide for Organisers at Events and Venues* (HSE, 2000) ISBN 978-0-71761-834-7

O'Hara B, Beard M – *Music Event and Festival Management* (Wise Publications, 2006) ISBN 978-1-92102-973-8

Shone A, Parry B – *Successful Event Management* (Cengage Learning EMEA, 2004) ISBN 978-1-84480-076-6

Van der Wagen L – *Human Resource Management for Events: Managing the Event Workforce* (Butterworth-Heinemann, 2006) ISBN 978-0-75066-998-6

Journals and/or magazines

Event Organiser (The Event Services Association)

International Journal of Contemporary Hospitality Management (Emerald Group Publishing Ltd)

International Journal of Event and Festival Management (Emerald Group Publishing Ltd)

International Journal of Event Management Research (Emerald Group Publishing Ltd)

International Journal of Hospitality and Event Management (Emerald Group Publishing Ltd)

Journal of Hospitality, Leisure, Sport and Tourism Education (Elsevier)

Websites

http://careers.theguardian.com/careers-blog/events-management	Careers advice
www.creative-choices.co.uk	Information on a different creative sectors
www.eventjobsearch.co.uk/jobs/event-management/	Job search
www.eventmagazine.co.uk/Business/article/1035666/Events-industry-worth361bn-read-full-report/	Event magazine
www.imex-frankfurt.com	Exhibition
www.myjobsearch.com/careers/events-manager.html	Information about Event Manager jobs
www.nationalcareersservice.direct.gov.uk/advice/planning/jobprofiles/Pages/EventsManager.aspx	National Careers Service
www.raconteur.net/business/valuing-the-events-industry-for-economic-growth	Articles aimed at events professionals and business travellers
www.totalprofessions.com/profession-finder/sector-summaries/hospitality-and-events-management	Total professional – information about the sector

Unit 2: Understanding how to Research and Report Information to Plan and Organise an Event

Unit reference number: F/600/8550

Level: 3

Credit value: 4

Guided learning hours: 24

Unit aim

This unit focuses on the importance of careful and thorough planning in order to ensure the success of an event. Learners will need to show how to gather information from a range of sources relevant to preparing an event. They will need to demonstrate how to critically review qualitative and quantitative information, analyse the reliability of the information sources and draw conclusions. Finally, learners must make and keep suitable records and formulate recommendations.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to research information for an event	1.1	Explain the importance of research to planning and organising events	<ul style="list-style-type: none"> Importance of research to planning and organising events: to ensure plans for the event are accurate and complete; to obtain current information and feedback that may impact on planning the event, e.g. changes in legislation, changes in licensing requirements, feedback and data from similar events; to ensure all the information is collated in advance
		1.2	Describe the types of information that need to be researched to plan and organise an event	<ul style="list-style-type: none"> Types of information needed: the type of event, type of venue, e.g. indoor, outdoor, purpose built, temporary; specific requirements or features of the venue, e.g. capacity, environmental issues, power supplies, access; date, time and duration, potential attendance, contractual arrangements, e.g. contractor/sub-contractors to be used, health and safety requirements, ticketing, promotion and sales arrangements, staffing, security, access, transport, hospitality and catering required
		1.3	Critically compare different information sources that may be used to obtain information relevant to planning and organising an event	<ul style="list-style-type: none"> Different information sources that could be researched, e.g. internet, media, organisational records and reports, local authority records and reports, HSE records and reports, specialist event staff, security professionals, social media sites, customer surveys Why it is important to assess these for reliability; why some may be based on personal opinions; how some data may be unduly influenced by unique circumstances, e.g. severe weather, transport and logistical problems, major incidents

Learning outcomes		Assessment criteria	Unit amplification
		1.4 Critically compare the research methods that may be used to plan and organise an event	<ul style="list-style-type: none"> □ Research methods to use: personal interviews, discussions, reading reports and summaries, analysing raw data from events, reading case studies of events, e.g. in trade journals, in official publications □ How to decide which key aspects of information are needed to plan and organise the event □ Importance of defining specific information needed or research to be undertaken, allowing sufficient time to complete research, how to delegate some aspects of research to others, e.g. data collection and analysis, arranging interviews
		1.5 Explain how to select the most appropriate and reliable information sources and research methods	<ul style="list-style-type: none"> □ Selecting information sources and research methods: how to take into account personal preferences as opposed to professional opinions when gathering information; the importance of ensuring data is current, accurate and complete; how data can be skewed through errors or omissions; the importance of cross checking data using different sources; how to balance out the conclusions drawn from data and opinions; the importance of selecting reliable information sources and research methods before making recommendations; selecting information sources, e.g. based on reputation, based on independence, based on experience
		1.6 Explain why it is important to maintain a record of sources to be used	<ul style="list-style-type: none"> □ Record of sources to be used: why it is important to keep records so that these can be referred to later, so that these can be provided to the relevant people, e.g. event sponsor, venue owner, licensing officer, event coordinator; referring to sources when evaluating the event

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to report information to assist the planning and organisation of an event	2.1	Explain who will need to see the outcomes of research	<ul style="list-style-type: none"> Outcomes of research: the range of people who may need to see information gathered, e.g. the event sponsor, local community groups, local authority officers, event team staff, venue owners and managers, contractors, performers, security staff; how certain information may need to be restricted
		2.2	Explain why it is important to systematically analyse information when planning and organising an event	<ul style="list-style-type: none"> Importance of systematically analysing the information: to be confident in its accuracy and completeness, so that all aspects of the event have been covered, so that meaningful conclusions can be drawn; so that plans are not developed based on inaccurate data, e.g. anticipated audience, venue capacity; so that budget and resource needs are based on accurate information; what might happen if incorrect or inaccurate information is used to plan an event, e.g. venue is inappropriate, staffing requirements are incorrect, equipment is adequate, budget is insufficient
		2.3	Describe different methods that can be used to collate and analyse both quantitative and qualitative information	<ul style="list-style-type: none"> Analysing qualitative information: opinions, reactions and interactions of event attendees, event staff, event sponsors, officials etc by analysing feedback, surveys, videos and films of events, reviewing records of communications related to events Analysing quantitative information: attendance estimates, ticketing and sales records, income and expenditure breakdown, records of incidents, safety records
		2.4	Describe different formats for reporting information	<ul style="list-style-type: none"> Different formats for reporting information: summary word-processed reports, briefing notes, e.g. bulleted lists; detailed findings, e.g. reports set out under headed sections with an index, appendices; Power Point presentations, web-based presentations, DVD visual tours, e.g. of an event site, verbal reporting, tabular summaries, graphics, e.g. charts, maps, photos

Learning outcomes		Assessment criteria	Unit amplification
		2.5 Explain how to select the most appropriate format for reporting information	<ul style="list-style-type: none"> Selecting the most appropriate format to suit the needs of the recipient and their right to know information; considering needs for timeliness, e.g. how quickly the information is needed, what other actions or plans are dependent on the information being reported; ensuring copies of key information are provided; ensuring confidential information is marked accordingly; using clear language, reinforcing key messages
		2.6 Explain how to draw conclusions and make recommendations	<ul style="list-style-type: none"> Drawing conclusions and making recommendations: the importance of being able to validate conclusions by reference to sources used and data collected; offering alternative recommendations with benefits and issues; prioritising recommendations; the importance of recommendations being SMART – specific, measurable, achievable, realistic and time bound; aligning recommendations to critical success factors for the organisation or event sponsor

Information for tutors

Delivery

This unit links to units on event planning and implementation.

This unit should be delivered in a way that develops learner knowledge and understanding of effective working relationships and their value in planning and coordinating events.

Learners need to know and understand:

- the importance of research when planning an event
- how to identify and gather information required to aid planning
- how to analyse qualitative and quantitative data and be confident of conclusions
- how to present findings and make recommendations

A starting point could be for learners to select two different, contrasting events (for example small-scale indoor, small-scale outdoor, from different sectors) and initially to identify the information that would be required in order to plan these. Individuals could present these to colleagues and then use them as a platform for further discussion in smaller groups on where and how to obtain the information, how to check its reliability and how to present the information to colleagues. Tutors can take feedback on a flipchart or board and then share the findings of individual groups.

This could then be developed into an assignment/case study to look at two contrasting forthcoming events and summarise the information required to plan these. This research could be presented via a presentation and include an evaluation against possible critical success factors for the event.

Knowledge of event management planning gained through active involvement rather than through a purely theoretical context, is preferable. Wherever possible, learners should have the opportunity to work with event management professionals or those involved in events so that they can experience this.

Assessment

Learners must meet all assessment criteria to pass the unit.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. For example, an assignment/ project to research an event opportunity, plan the event and implement the plan would also provide evidence of establishing and maintaining effective working relationships, understanding of health, safety and security requirements and how to setup and breakdown an event.

The main source of evidence for this unit is likely to be the assignment/case study outlined above. This should be based on actual events.

Simulation, such as role play, for example of an event-planning meeting with contractors or colleagues, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that it is valid, fair and reliable as a source of evidence.

Additional evidence of knowledge and understanding can be gathered through professional discussion with the learner.

Suggested resources

Textbooks

- Bowdin G, Allen J, O'Toole W, Harris R, McDonnell I – *Events Management* (Routledge, 3rd edition, 2011) ISBN 978-1-85617-818-1
- Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013) ISBN 978-1-11859-112-3
- Gaur S – *Event Marketing and Management* (Vikas Publishing House, 2009) ISBN 978-8-12591-449-5
- Goldblatt J – *Special Events: Best Practices in Modern Event Management* (Van Nostrand Reinhold, 2nd edition, 1997) ISBN 0-442-02207-7
- HSE – *Event Safety Guide* (HSE, 1999) ISBN 978-0-71762-453-9
- O'Hara B, Beard M – *Music Event and Festival Management* (Wise Publications, 2006) ISBN 978-1-92102-973-8
- Shone A, Parry B – *Successful Event Management* (Cengage Learning EMEA, 2004) ISBN 978-1-84480-076-6
- Van der Wagen L – *Human Resource Management for Events: Managing the Event Workforce* (Butterworth-Heinemann, 2006) ISBN 978-0-75066-998-6
- Watt D – *Event Management in Leisure and Tourism* (Addison Wesley Longman Ltd, 1998) ISBN 0-582-35706-3

Journals and/or magazines

- Event Organiser* (The Event Services Association)
- International Journal of Contemporary Hospitality Management* (Emerald Group Publishing Ltd)
- International Journal of Event and Festival Management* (Emerald Group Publishing Ltd)
- International Journal of Event Management Research* (Emerald Group Publishing Ltd)
- International Journal of Hospitality and Event Management* (Emerald Group Publishing Ltd)
- Journal of Hospitality, Leisure, Sport and Tourism Education* (Elsevier)

Websites

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| www.aeme.org | Association for Events Management Education |
| www.businessballs.com/project.htm | Free ethical learning and development resources |
| www.eventbrite.co.uk | Find events in your local area |
| www.wrap.org.uk/category/sector/event-management | Helps businesses reduce waste, develop sustainable products and use resources in an efficient way |

Unit 3: Understanding Operational Event Planning

Unit reference number: J/600/8551

Level: 3

Credit value: 4

Guided learning hours: 25

Unit aim

This unit focuses on the importance of careful and thorough planning in order to ensure the success of an event. Learners will need to show how to gather information from a range of sources relevant to preparing an event. They will need to demonstrate how to critically review qualitative and quantitative information, analyse the reliability of the information sources and draw conclusions. The importance of effective communications with colleagues and stakeholders and the need to follow procedures are emphasised. Finally, learners must make and keep suitable records and formulate recommendations.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to research events	1.1	Explain the importance of researching the overall strategic plan for the event prior to detailed planning	<ul style="list-style-type: none"> □ Importance of researching the overall strategic plan for the event prior to detailed planning: to ensure the strategic plan for the event is accurate and comprehensive; to obtain current information and feedback which may impact on planning the event, e.g. changes in legislation, changes in licensing requirements, feedback and data from similar events; to ensure all the information is collated in advance □ Researching using personal interviews, discussions, reading reports and summaries, analysing raw data from events
		1.2	Explain the importance of researching and building on the successes of other similar events	<ul style="list-style-type: none"> □ Why it is important to research similar events: to build on success, e.g. by identifying aspects of an event which worked well, analysing the reasons for this and considering how this may be extended, modified or adapted to improve impact; to learn from mistakes, to identify aspects needing improvement; to anticipate audience needs correctly; to introduce facilities, resources to improve the event; to forecast budget requirements, security needs
		1.3	Identify useful sources of information on similar events	<ul style="list-style-type: none"> □ Sources of information on similar events: internet, media, organisational records and reports, case studies in trade journals, local authority records and reports, HSE records and reports, specialist event staff, security professionals, social media sites, customer surveys
		1.4	Explain the importance of keeping up to date with current practice in event planning	<ul style="list-style-type: none"> □ Importance of keeping up to date with current practice in event planning: to comply with current requirements, e.g. of licensing authority, of the HSE; to reflect industry best practice, to maintain the organisation's reputation, to ensure success

Learning outcomes		Assessment criteria		Unit amplification
		1.5	Explain the importance of seeking innovation in event planning	<ul style="list-style-type: none"> □ How and why to be innovative in event planning: using new visual displays, offering ticketing packages, using new promotional techniques or approaches; being innovative to attract media attention, to enhance the organisation's reputation, to gain new customers, to fulfil expectations of event sponsors, to motivate event staff

Learning outcomes		Assessment criteria		Unit amplification
2	Understand the process of developing detailed plans for an event	2.1	Describe the principles and methods of developing detailed plans for events	<ul style="list-style-type: none"> Principles and methods of developing detailed plans for events: gathering information relating to the venue, e.g. capacity, location of the stages, barriers, front-of-house towers, delay towers, entries and exit points, emergency routes, first-aid and triage areas, positioning of toilets, merchandising stalls etc; gathering information specific to the event: potential attendance, seating required or not required, security issues, date, duration, stakeholder interest; allocating sub-headings in the plan for different aspects of the event; setting out timelines for each aspect and each stage of the plan, assigning responsibilities for each aspect, deciding on sequence of preparations
		2.2	Describe what a detailed plan should cover	<ul style="list-style-type: none"> What a detailed plan should cover: venue design, selection of competent workers, selection of contractors and sub-contractors, construction of the stages, marquees, fencing; delivery and installation of equipment and services which will be used at the event, e.g. stage equipment used by the performers, lighting, public address (PA) systems; effective crowd management strategies, security, transport management strategies and welfare arrangements; strategies for dealing with fire, first aid, contingencies and major incidents; safe removal of equipment and services; controlling risks once the event is over, dismantling the infrastructure; collection of rubbish and waste-water disposal
		2.3	Explain the importance of making the plan consistent with the overall goals, objectives, critical success factors and other requirements for an event	<ul style="list-style-type: none"> Why it is important to ensure the plan is consistent with the overall goals, objectives, critical success factors and other requirements for an event; so that the organisation's aims for the event are achieved, e.g. improved revenue targets, audience targets, promotion and sales; to provide a coherent framework for the event; to ensure the operational plan focuses on what is needed to deliver the organisation's critical success factors

Learning outcomes		Assessment criteria		Unit amplification
		2.4	Describe typical requirements for events, including legal and regulatory requirements	<ul style="list-style-type: none"> □ Typical requirements for events: the range of legal requirements for different events and venues, e.g. Health and Safety at Work Act, Management of Health and Safety at Work (Management), Noise at Work, Work at Height, Electricity at Work, The Workplace (Health, Safety, and Welfare), COSHH Regulations, Environmental Protection, Controlled Waste; industry guidelines for events covering, e.g. methods of ensuring facilities and staff are adequate to ensure safety and wellbeing; requirements for major incident plans, contingency plans, operational plans
		2.5	Give 10 examples of the types of contingencies that may occur with events	<ul style="list-style-type: none"> □ Types of contingencies that may occur with events: fire, floods, adverse weather, accidents, illness, security incidents and alerts, structural failure, crowd surge or collapse, crowd disorder, over-stretched capacity, power failure, equipment malfunction, structural failings, e.g. of stage, lighting rigs, marquees, transport failure or delays impacting on entry and egress
		2.6	Explain how to plan for possible contingencies	<ul style="list-style-type: none"> □ How to plan for possible contingencies: through liaison with licensing and certifying authority and emergency services, through consultation with fellow professionals and experts, e.g. security, transport and logistics, hospitality, audio technicians; through researching similar events, events where contingencies occurred; the importance of setting out contingency plans clearly, communicating these to relevant personnel

Learning outcomes		Assessment criteria		Unit amplification
3	Understand how to allocate people and resources to planned event activities	3.1	Describe methods of allocating personnel and other resources to plan components	<ul style="list-style-type: none"> Allocating personnel to different aspects of the plan, e.g. by reference to numbers and types of personnel needed to adequately staff the event, by identifying and matching competencies required, on the basis of personalities suited to the event, by seeking volunteers for specific aspects, on the basis of seniority within the organisation, on the basis of availability for the event, on the basis of security clearance
		3.2	Describe methods of allocating physical resources to plan components	<ul style="list-style-type: none"> Allocating resources: resources are physical, e.g. equipment, venue, facilities, power, transport; allocating to the different components of the plan, e.g. by estimating requirements based on previous or similar events, by prioritising based on identified critical success factors, based on requirements identified in the operational plan for the event, based on availability
		3.3	Describe methods of allocating financial resources to plan components	<ul style="list-style-type: none"> Allocating financial resources: how to allocate and manage budgets in line with the event plan; setting out headings for each key aspect of the event, e.g. security, transport, equipment, venue hire, staffing, publicity, ticketing, sales; assigning budget limits for each heading based on research and information about the event; estimating costs for each heading; adding in contingency funds; monitoring actual and anticipated spend against each heading; monitoring actual against anticipated income; making adjustments, e.g. vehement between budget headings to deal with problems or unexpected expenditure; agreeing persons to authorise spending, agreeing spend limits and authorities

Learning outcomes		Assessment criteria		Unit amplification
4	Understand the process of finalising detailed plans for events	4.1	Describe different methods of presenting plans so that they can be easily implemented	<ul style="list-style-type: none"> □ Presenting plans: using different formats so that they can be easily understood and implemented, e.g. presentations, web-based presentations, verbal reporting, tabular summaries, graphics, e.g. charts, maps, photos; identifying when to present plans to achieve maximum support
		4.2	Explain the importance of having the agreement and support for all key stakeholders for your programme plans	<ul style="list-style-type: none"> □ Importance of gaining support and agreement of all stakeholders: stakeholders are all individuals or organisations that have a material, legal or political interest in the event, e.g. commissioning agents, performers, facility owners and managers, contractors, suppliers, security officials, emergency services, licensing authority officers; those who may be affected by the event or related activities, e.g. neighbourhood or local community members and groups, members of the public; how to gain support by consulting in relation to key decisions and activities, taking into account views, priorities, expectations and attitudes to potential risks; the importance of working towards win-win situations to ensure the event is successful
		4.3	Identify planning information that needs to be disseminated to stakeholders	<ul style="list-style-type: none"> □ Information that needs to be disseminated to different stakeholders, why some information may be restricted
		4.4	Describe the different methods that can be used to disseminate event plans to stakeholders	<ul style="list-style-type: none"> □ Disseminating event plans: the different methods that can be used to disseminate event plans to stakeholders and when to use them, e.g. phone, email, text, letter; protocols that should be followed when circulating information to stakeholders, e.g. copying in, group circulations; when issues of security or confidentiality affect contact and communications with and between stakeholders

Learning outcomes		Assessment criteria		Unit amplification
5	Understand the organisational context for developing detailed event plans	5.1	Describe the typical responsibilities of an event organiser at the planning stage	<ul style="list-style-type: none"> □ Typical responsibilities of an event organiser: promotion and management of the event; preparing operational strategies for crowd management, transport management, fire, first aid, major incident and contingencies; allocation of responsibilities for different stages of the event; monitoring completion of each stage; reporting progress to event sponsors, licensing authority; ensuring competencies of event staff, contractors and sub-contractors; identifying training needed for event staff
		5.2	Describe how the event organiser's role relates to the roles of others in relation to planning an event	<ul style="list-style-type: none"> □ Event organiser's role: the prime responsibility for protecting the health, safety and welfare of everyone working at, or attending, the event; how this role relates to others involved in planning an event, e.g. site safety officer, emergency services, local authority licensing officers, environmental health officers, security advisers, contractors, event sponsors and promoters; how the event organiser's role changes, e.g. liaising with others, coordinating their input into the plan, delegating certain tasks such as research and data collection, security arrangements, hospitality; how the event organiser must respond to and meet the requirements of the licensing authority and emergency services
		5.3	Describe the main responsibilities of colleagues with whom the event planner will work when developing detailed plans	<ul style="list-style-type: none"> □ Main responsibilities of colleagues: liaison with contractors, sub-contractors, licensing officers, event sponsors, performers, safety officers; providing updates of progress, problems, developing issues for each aspect for which they have responsibility, seeking authorisation where necessary from the event organiser
		5.4	Describe an organisation's procedures in relation to developing detailed plans	<ul style="list-style-type: none"> □ Organisational procedures: procedures covering event planning and preparation; the importance of following the organisation's procedures in relation to developing detailed plans, what could happen if procedures are not followed, e.g. delays with contractors, issues not identified, promotion opportunities missed

Learning outcomes		Assessment criteria		Unit amplification
		5.5	Describe an organisation's style and methods for distributing planning information	<ul style="list-style-type: none"> □ Organisation's style and methods for distributing planning information: how to prioritise dissemination of planning information; how to observe protocols when circulating information with colleagues and stakeholders, e.g. copying in, group circulations; when issues of security or confidentiality affect contact and communications with and between colleagues and stakeholders; how to ensure contact is secure and confidential, e.g. restricted circulation, need-to-know basis; when to use certain methods of communications, e.g. phone, email, text, letter; why it is important to follow agreed methods of communications and contact with colleagues and stakeholders; the impact on working relationships if agreed communication methods and protocols are not followed

Information for tutors

Delivery

This unit links to all the other units in this qualification.

This unit should be delivered in a way that develops knowledge and understanding of effective working relationships, and their value in planning and coordinating events.

Learners need to know and understand:

- the importance of careful planning and preparation for an event
- how to plan the event using project management techniques
- who to consult with during the planning stage
- the benefits of researching other events when planning
- the range of communication methods that could be used
- how to disseminate plans correctly
- the processes and protocols to be followed with other organisations and stakeholders
- the various legal and other requirements that must be taken into account during the planning stage

A starting point could be for learners to select two different types of events, for example small-scale indoor, small-scale outdoor, and initially to identify the key features of the two events that would need to be included in an operational plan. Individuals could present these to colleagues and then use them as a platform for further discussion in smaller groups on how to prioritise, allocate resources and establish timescales. Issues such as security, venue, facilities, transport, hospitality, safety and the environment should be covered. Tutors can take feedback on a flipchart or board and then share the findings of individual groups.

Further assignments or case studies could include preparing a detailed operational plan for the two types of event selected. Using the internet to identify similar events would help learners to understand the range of aspects that need to be considered in the planning stage. Alternatively, learners may have ideas for actual events which they intend to initiate, in which case, tutors should ensure that the proposed scale is sufficient to cover all aspects, and make modifications to the proposal as needed for the purposes of this unit. Learners should use project management techniques to plan the events, including Gantt charts to set out sequential implementation.

Knowledge of event preparation gained through active involvement rather than through a purely theoretical context is key. Wherever possible, learners should have the opportunity to interact with event management professionals, for example through presentations, workshops or work shadowing, so that they can discuss how event requirements are prioritised and monitored using operational plans.

Assessment

Learners must meet all assessment criteria to pass the unit.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. For example, an assignment/project to research an event opportunity, plan the event and implement the plan would also provide evidence of establishing and maintaining effective working relationships, understanding of health, safety and security requirements and how to setup and breakdown an event.

Such integrated approaches enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria efficiently and in a manner that is meaningful for a working role. Centres are strongly encouraged to emphasise the practical application of knowledge and understanding in a work-related setting.

The predominant source of evidence for this unit is likely to be product evidence of planning events – either naturally occurring from an event management role or during an assignment/project, as suggested above. Typical evidence would include, for example actual event plans, photos of wall charts showing event project planning, memos or emails to colleagues allocated to aspects of the event, communications with contractors, records of phone calls chasing progress against deadlines and summaries of event progress to stakeholders and colleagues.

If learners are employed it should be possible to observe them undertaking event-planning meetings, thereby gaining direct evidence of their ability to prioritise, make judgements on appropriate timescales, and adapt plans as needed to meet deadlines.

Witness testimony from colleagues, suppliers, contractors, officials and managers could be obtained verbally to provide evidence particularly of the learner's organisational skills and interpersonal skills, for example calmness under pressure, liaising with others involved in the planning.

Additional evidence of knowledge and understanding may be gathered through professional discussion with learners. They should be encouraged to bring evidence of their performance to the discussion, so that this may be referred to as validation.

Simulation, such as role play, for example of an event-planning meeting with contractors or colleagues, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that it is valid, fair and reliable as a source of evidence.

Suggested resources

Textbooks

- Bowdin G, Allen J, O'Toole W, Harris R, McDonnell I – *Events Management* (Routledge, 3rd edition, 2011) ISBN 978-1-85617-818-1
- Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013) ISBN 978-1-11859-112-3
- Gaur S – *Event Marketing and Management* (Vikas Publishing House, 2009) ISBN 978-8-12591-449-5
- Goldblatt J – *Special Events: Best Practices in Modern Event Management* (Van Nostrand Reinhold, 2nd edition, 1997) ISBN 0-442-02207-7
- HSE – *Event Safety Guide* (HSE, 1999) ISBN 978-0-71762-453-9
- HSE – *Guide to Risk Assessment* (HSE, 2011) ISBN 978-0-71766-440-5
- HSE – *Managing Contractors: A Guide for Employers* (HSE, 2011) ISBN 978-0-71766-436-8
- HSE – *Managing Crowds Safely: A Guide for Organisers at Events and Venues* (HSE, 2000) ISBN 978-0-71761-834-7
- O'Hara B, Beard M – *Music Event and Festival Management* (Wise Publications, 2006) ISBN 978-1-92102-973-8
- Watt D – *Event Management in Leisure and Tourism* (Addison Wesley Longman Ltd, 1998) ISBN 0-582-35706-3

Journals and/or magazines

- Event Organiser* (The Event Services Association)
- International Journal of Contemporary Hospitality Management* (Emerald Group Publishing Ltd)
- International Journal of Event and Festival Management* (Emerald Group Publishing Ltd)
- International Journal of Event Management Research* (Emerald Group Publishing Ltd)
- International Journal of Hospitality and Event Management* (Emerald Group Publishing Ltd)
- Journal of Hospitality, Leisure, Sport and Tourism Education* (Elsevier)

Other

- Getz D – *The Nature and Scope of Festival Studies (International Journal of Event Management Research) Volume 5, Issue 1 2010*
- Robinson R – *Innovative Approaches to Event Management Education in Career Development: A Study of Student Experiences*

Websites

www.aeme.org	Association for Events Management Education
www.businessballs.com/project.htm	Free ethical learning and development resources
www.eventbrite.co.uk	Find events in your local area
www.hse.gov.uk/event-safety	Guidance on running events safely
www.wrap.org.uk/category/sector/event-management	Helps businesses reduce waste, develop sustainable products and use resources in an efficient way

Unit 4: Understanding Health, Safety and Security at Events Sites

Unit reference number: L/600/8552

Level: 4

Credit value: 5

Guided learning hours: 40

Unit aim

This unit focuses on what learners must know and understand in relation to health, safety and security at event sites. The crucial importance of identifying and managing risk, and how this differs from event to event, is stressed. Learners must show that they understand the legal responsibilities and liabilities relating to health, safety and security at events. They are also required to know how to respond effectively and correctly to incidents and contingencies that might occur at different types of events or venues.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand health and safety in the events industry	1.1	Explain the three main reasons why health and safety at work is important	<ul style="list-style-type: none"> Why health and safety at work is important: legal, statutory and organisational requirements for all employers and employees; to protect public safety and health, to avoid fatalities and serious injuries, to promote public confidence and assurance
		1.2	Explain the importance of health and safety in the events/temporary structures' industry	<ul style="list-style-type: none"> Specific health and safety requirements for the events and temporary structures industry: venue safety, facilities and equipment safety, e.g. stages, lighting sets, special effects, including fireworks, fog, lasers, projections; personnel safety including personal and medical welfare of those attending the event The need to consider event site rules, welfare facilities, muster points, fire points, first-aid facilities, emergency contact numbers, access and egress, facilities and procedures for people with disabilities
		1.3	Explain what may happen if health and safety procedures are not properly implemented	<ul style="list-style-type: none"> Implications if health and safety is compromised: injuries or accidents, illness, the possibility of legal action if health and safety procedures are not implemented, loss of reputation, loss of public events licence Wider implications if health and safety requirements are not complied with: impact on people and property in proximity to the event, potential risks to transport in the locality
		1.4	Identify industry guidelines and good practice on health and safety	<ul style="list-style-type: none"> Guidelines and good practice to follow: Event Safety Guide (Purple Guide) and Guide to Safety at Sports Grounds (Green Guide), organisational guidelines, local guidelines; HSE guidance on health and safety when using different equipment and effects at events

Learning outcomes		Assessment criteria		Unit amplification
		1.5	Identify the meaning of safety signs and symbols used in the industry	<ul style="list-style-type: none"> □ Safety signs and symbols: the legal requirements that must be complied with, e.g. Health and Safety (Safety Signs and Signals) Regulations; the range of safety signs and symbols that may be used at different types of events, e.g. electronic screens, notices, illuminated signs; where and how to fix them, why it is important that these are visible and easily recognisable, why those officiating and attending events must recognise these and comply with them

Learning outcomes	Assessment criteria	Unit amplification
	1.6 Explain site rules, welfare facilities, muster points, fire points, first aid facilities, emergency contact numbers, access and egress and general job briefing on a typical events site	<ul style="list-style-type: none"> □ Site rules: rules laid down for the event to control safety and security, to ensure licensing conditions and legal requirements are complied with, including specific responsibilities for areas and activities, reporting procedures, contingency instructions, control of prohibited items, unauthorised activities, entry conditions, standards and use of equipment, timing and methods for set-up, load in, load out and breakdown; rules are agreed with Local Authority officers, Emergency services, contractors □ Welfare facilities: rest rooms, toilets, drinking water □ Muster points: designated points across the event site to gather people for use in an emergency, why these should be coded, how to ensure site maps show these clearly and accurately, how to place them in safe areas □ Fire points: access for fire service vehicles, turning areas, fire extinguishing equipment □ First-aid facilities: triage areas, first-aid rooms, ambulance parking areas, who is responsible for maintaining □ Emergency contact numbers: Fire, Ambulance and Police contact numbers, Site Safety Supervisor or Coordinator's contact number, protocols for contacting each <ul style="list-style-type: none"> □ Access and egress: for different areas of the site, final exit points, rules for controlling access and egress for each area, rules for controlling the perimeter, rules to ensure safety and lack of obstruction, e.g. width, distances, ramps, lighting □ Event briefing: how site rules are a crucial part of event briefings, how these change depending on the event, the audience profile, expected issues; the importance of ensuring event staff fully understand site rules at the briefing

Learning outcomes		Assessment criteria		Unit amplification
2	Understand responsibilities and liabilities for health and safety at events sites	2.1	Explain the employers' responsibilities and liabilities for health and safety at work	<ul style="list-style-type: none"> □ Employer responsibilities: Health and Safety at Work, Management of Health and Safety at Work (Management Regulations), Noise at Work, Work at Height, Electricity at Work, The Workplace (Health, Safety, and Welfare), COSHH, Environmental Protection, Controlled Waste; responsibilities relating to hazard identification and risk assessment of venue safety, facilities and equipment, personnel safety, personal and medical welfare of those officiating and attending the event site including provision of first aid, toilet and food and water facilities; safe disposal of refuse and waste; safety and wellbeing of those impacted by the event, e.g. in the locality □ Employer liabilities: public liability for damages, costs, loss, injury incurred in connection with the event, e.g. property damage, injury or death, illness or disease, wilful or malicious vandalism; why it is important to comply with legal requirements and responsibilities for public liabilities; how insurance can be invalidated if procedures are not followed
		2.2	Explain every employee's responsibility and liabilities for health and safety at work	<ul style="list-style-type: none"> □ Employee responsibilities: legal, organisational, industry best practice relating to hazard identification and risk assessment, duty of care to ensure safety and wellbeing of self and others; the importance of following guidelines and procedures and encouraging others to do so; the implications of not complying with guidelines and procedures □ Additional responsibilities of the event supervisor: liaising with licensing/certifying authority and emergency services, supervising contractors in setup and breakdown, management and recording of control procedures, ensuring facilities and staff are adequate to ensure safety and wellbeing, preparing operational plan, emergency plan, contingency plan, briefing event staff □ Employee liabilities: legal duty of care to maintain safety of self and others

Learning outcomes	Assessment criteria		Unit amplification
	2.3	Explain a site supervisor's additional on-site responsibilities and liabilities for health and safety	<ul style="list-style-type: none"> □ Supervisor's additional responsibilities and liabilities for health and safety: the overarching duty of care to work safely and to ensure the safety of others including event personnel and members of the public, setting a professional example to event staff, appointing and managing an event safety coordinator, following health and safety requirements and guidelines for all aspects before, during and after an event, e.g. drawing up operational plans, contingency plans, liaising with emergency services, carrying out risk assessments, managing the control of entry and egress, monitoring security before, during and after the event, ensuring hospitality facilities meet health and safety requirements including food safety, monitoring the set-up and handling of equipment including special effects, lighting and sound systems, ensuring that equipment is used safely, arranging for event personnel to be trained in health and safety, ensuring that those involved in designated activities at the event are licensed, reporting on health and safety including any incidents after the event
	2.4	Explain the health and safety responsibilities and liabilities of other people working on site	<ul style="list-style-type: none"> □ Health and safety responsibilities of those working on site: the requirements of the Health and Safety at Work Act for everyone to work safely and be responsible for others' safety, to follow organisational and manufacturer's instructions when using equipment, to handle and move equipment and loads safely, to respond to injury or illness correctly; liabilities of all on site, e.g. sound and light engineers, stage technicians, security staff, close protection staff, catering staff, volunteers; why it is important to act in accordance with the event guidelines, to follow event briefing instructions; how failure to do so may create hazards, invalidate insurance, damage public standing of the organisation

Learning outcomes		Assessment criteria		Unit amplification
3	Understand risk assessment and control on events sites	3.1	Describe the steps in risk assessment	<ul style="list-style-type: none"> Five risk assessment steps: identifying the risk, deciding who may be harmed and how, evaluating the risks and defining precautions, recording and implementing findings, reviewing
		3.2	Explain the difference between 'generic' and 'dynamic' risk assessment and the importance of each	<ul style="list-style-type: none"> Generic risk assessment as a framework to describe how all risk assessments for events are carried out, what they should include, how they set out parameters against which operational plans and contingency plans can be made Dynamic risk assessments to be undertaken for specific events both before and during the event; why it is important to use both forms of risk assessment, e.g. to respond to and control incidents, to manage contingencies, to evaluate changing situations
		3.3	Describe the typical hazards that may occur when working on site, e.g. severe weather, underground and overhead services, trip and fall hazards, etc	<ul style="list-style-type: none"> Typical hazards that may occur at an event site: fire or explosion, severe weather, flooding, power failure, drainage blocks, trip and fall hazards, lack of or breakdown in facilities, equipment malfunction or breakdown, crowd surges or disorder, vandalism and damage to facilities or equipment, blocked or inaccessible access points
		3.4	Explain the risks associated with each of these hazards	<ul style="list-style-type: none"> Risks that these may present in different types of events: indoor, outdoor, in open spaces, in confined areas, at sites designed for public events, at sites not designed for public events Range of risks: potential injury or fatality, damage to public health, loss of amenity, delay in event schedule, breach of security, loss of personal possessions, damage to the environment
		3.5	Explain how these risks can be eliminated or controlled	<ul style="list-style-type: none"> How to manage the risks: following contingency plans, following the organisation's method statement; the importance of designating key personnel to monitor specific areas and activities; setting out reporting intervals and protocols; using different methods to monitor and control risk, e.g. observation platforms, CCTV, radio, personal surveillance, patrols

Learning outcomes		Assessment criteria		Unit amplification
		3.6	Explain what a method statement is and why it is important	<ul style="list-style-type: none"> □ Method statements for events: as a means of itemising all aspects of preparing, setting up, loading in, loading out and breakdown of an event so that each can be checked and completed on a due date; to identify responsibilities for each aspect; method statements include safe working arrangements for the event, e.g. risk assessments, staff required, staff training and competencies, equipment required, checking compliance with safety legislation □ Importance of completing a Method Statement: to prepare and plan effectively, to meet local authority and emergency services requirements, to highlight shortfalls, to identify specific venue or event requirements

Learning outcomes		Assessment criteria		Unit amplification
4	Understand health and safety inspection procedures at events sites	4.1	Describe the different types of people who may carry out on-site health and safety inspections and the powers of each	<ul style="list-style-type: none"> □ Health and safety inspections: the process and purpose of onsite health and safety inspections, who carries these out, e.g. Fire Authority, Police Authority, Health and Safety Enforcement officers, Local Authority; what they cover, e.g. emergency access routes, places of safety, seating capacity, event capacity, entry and egress points, emergency lighting, door and gate fastenings, noise and sound levels, fire fighting equipment, fire alarm equipment, special risks for certain types of stage and equipment; the possible outcomes of an inspection, e.g. Prohibition Notice, Improvement Notice issued under Environment & Safety Information Act 1988, powers of officers to prevent an event taking place, to issue a schedule of remedial works to complete, to publish the notice
		4.2	Explain the effects of each of the following: <ul style="list-style-type: none"> • A Prohibition Notice • An Improvement Notice 	<ul style="list-style-type: none"> □ Why a Prohibition Notice might be issued: when the Fire Authority believe that the use of the premises for an event would pose a serious risk to those involved or where the means of escape from the premises is inadequate; the effects of a Prohibition Notice to suspend the event until the Notice is withdrawn □ Why an Improvement Notice might be issued and the effects of this: how to record and use findings of the inspection to rectify shortfalls; who to liaise with about the findings of the inspection and to agree actions needed; the importance of complying with the Notice and following the schedule of remedial works; how to get a Notice withdrawn; appealing against Prohibition Notices; publication of the notice on a public register □ Importance to carry out inspections well in advance of the event; timescales for taking actions to regularise the situation so that the event can proceed

Learning outcomes		Assessment criteria		Unit amplification
5	Understand security procedures at events sites	5.1	Explain the importance of on-site security	<ul style="list-style-type: none"> □ Crucial role played by security staff at events: ensuring safe entry and egress, controlling authorised and unauthorised entry, emergency incidents, controlling restricted access areas, ensuring safety of those performing at and attending the event, monitoring for prohibited substances, unlawful behaviour, restricted items, liaison with Event Manager, liaison with emergency services; the different role and remit of others involved in security, e.g. police, stewards, event volunteers
		5.2	Explain what can happen if on-site security procedures are not properly implemented	<ul style="list-style-type: none"> □ What can happen if security procedures are not followed: crowd surges, crowd disorder, damage, theft, accidents, injuries, fatalities; delays due to uncontrolled or poorly marked entry or egress, disruptions to performance due to damage or theft of equipment.
		5.3	Describe typical on-site security problems and ways of dealing with these	<ul style="list-style-type: none"> □ Typical problems: crowd surges, crowd disorder, vandalism, damage to facilities, equipment, theft of or damage to personal possessions, accidents, theft of equipment, breach of perimeters, unauthorised access to designated areas, use of unauthorised substances, unlawful behaviour □ These may be different depending on the event type and event site, e.g. outdoor, indoor, large, small, in facilities designed for events, in facilities not designed for events, in urban areas, in rural areas □ Dealing with problems: contacting and liaising with emergency services, setting out ambulance points, implementing incident control points, following evacuation routes and assembly points, ensuring safe evacuation of disabled persons, scripting PA announcements, video screen alerts and coded security alerts and messages; obtaining situation reports, correct deployment of security and stewarding personnel, e.g. searching individuals, confiscating items, patrolling areas, ejecting individuals, detaining in secure areas

Learning outcomes		Assessment criteria		Unit amplification
6	Understand emergency procedures at events sites	6.1	Describe the typical emergencies that may occur on events/temporary structures sites	<ul style="list-style-type: none"> Emergencies: the legal requirement to manage emergencies and major incidents as set out in The Management of Health and Safety at Work (Management Regulations), potential emergencies at different types of event e.g. fire, floods, adverse weather, accidents, illness, security incidents and alerts, structural failure, crowd surge and collapse, crowd disorder, over-stretched capacity
		6.2	Explain the procedures to follow in response to the typical emergencies on events sites	<ul style="list-style-type: none"> Procedures are those set out in the Major Incident Plan, Event Contingency Plan Procedures include contact and liaison with emergency services, setting out ambulance points, implementing incident control points, following evacuation routes, assembly points, correct deployment of security and stewarding personnel, ensuring safe evacuation of disabled persons, scripting PA announcements, video screen alerts and coded security alerts/messages; obtaining situation reports
		6.3	Describe the procedures for reporting accidents and incidents	<ul style="list-style-type: none"> Legal requirements for reporting accidents and incidents: when and how the report must be made, maintaining agreed protocols for reporting, who to notify in case of an accident, e.g. Health and Safety Executive, Emergency Services, Local Authority; who to notify following an incident, e.g. Health and Safety Executive, Police, Local Authority; organisational procedures for reporting accidents and incidents
		6.4	Explain why reporting procedures for accidents and emergencies are important	<ul style="list-style-type: none"> Importance of reporting accidents and emergencies: to comply with legal requirements, to provide information to relevant authorities, to avoid further accidents or emergencies through rectifying faults, making improvements, learning from mistakes

Learning outcomes		Assessment criteria		Unit amplification
7	Understand how to maintain health, safety and security on events sites	7.1	Explain how to encourage staff to make health, safety and security priorities in their work	<ul style="list-style-type: none"> □ Importance of encouraging those involved to make health, safety and security priorities in their work: through event briefings, circulating clear guidance at appropriate points during planning, revisiting and reminding during the event □ Ensuring guidance is targeted to suit specific needs: event staff, contractors, security personnel, volunteers; arranging appropriate training on health, safety and security
		7.2	Explain how to behave on site to reinforce messages about health, safety and security	<ul style="list-style-type: none"> □ Reinforcing messages about health, safety and security: by setting an example from own behaviour, by complying with all legal and organisational requirements, by checking that others are complying with requirements, by verbally reminding personnel, by using signage and video screens to remind those attending the event, through announcements
		7.3	Describe how to monitor a site and the work taking place to make sure health, safety and security procedures are being followed	<ul style="list-style-type: none"> □ Monitoring: through personal observation, using CCTV in a control room, receiving telephone, radio and face-to-face reports from security staff, stewards, emergency services personnel; using method statements to check key activities have been completed
		7.4	Explain how to communicate information about health, safety and security to your staff and other relevant people	<ul style="list-style-type: none"> □ Range of methods that may be used to communicate information about health, safety and security to event staff and others such as emergency services, performers, contractors: briefings, handouts, route-marking and signs, information displays, screens, scoreboards, face-to-face contact, PA systems, radio systems, loud hailers; agreeing protocols for communications, ensuring event staff comply with these; having accurate site plans and maps with clear coding of areas

Learning outcomes		Assessment criteria		Unit amplification
8	Understand how to improve health, safety and security on events sites	8.1	Explain the importance of continuous improvement in relation to on-site health, safety and security	<ul style="list-style-type: none"> □ Importance of continuous improvement: in maintaining the organisation's reputation, to reassure the public, to ensure continuing good relationships with licensing authorities and emergency services □ Using findings from health and safety inspections, risk assessments and feedback to formulate improvement plans □ Researching other events to identify success factors; reviewing own critical success factors against performance measures
		8.2	Identify the people you can work with to help improve on-site health, safety and security	<ul style="list-style-type: none"> □ Consulting with other people who can support improvements: experienced security personnel, local authority officers, emergency services advisers, HSE officers, hospitality specialists

Information for tutors

Delivery

This unit underpins all other units in this qualification.

This unit should be delivered in a way that develops and emphasises understanding of the crucial importance of health, safety and security to event management.

Learners need to know and understand:

- the importance of health, safety and security when planning and implementing any event
- the regulatory requirements for all events and the specific requirements for particular types of events
- how to monitor health, safety and security issues at a range of events
- the controls that need to be in place to manage health, safety and security
- the range of contingencies that must be planned for

A useful opening would be through small-group discussions, during which learners can exchange their experiences of attending different events, for example music festival or concert – indoor/outdoor, sports event – indoor/outdoor, single or multiple locations, conference, banquet, presentation, fund raising event etc both in this country and overseas. The discussion should focus on how the events were managed, how safe learners felt during and after, how incidents and contingencies were dealt with at the event.

Learner groups could then be asked to identify the potential hazards or issues that a typical event might present, for example a Marathon/Half-Marathon run in their locality, a music concert held at their local stadium/theatre. Tutors can take feedback on a flipchart or board and then share the findings of individual groups.

Learners should be encouraged to look at incidents and emergencies that have occurred at events – by looking at video footage of events and/or listening to presentations/videos by event professionals who have dealt with health, safety or security issues. A useful exercise might be for learners to draw up a method statement for the event discussed and suggest how this could have prevented incidents/emergencies.

Assignments or case studies could include using the internet to identify events that experienced health, safety or security issues, such as severe weather, security threats/breaches, crowd incidents, emergencies. The summary of this research could be presented and could include an evaluation of the key health, safety or security factors that should be taken into consideration to avoid such issues in future.

Knowledge of risk assessment and management gained through active involvement rather than through a purely theoretical context is key. Wherever possible, learners should have the opportunity to work with or shadow event management professionals. This could be in a voluntary role.

Assessment

Learners must meet all assessment criteria to pass the unit.

The main source of evidence for this unit is likely to be product evidence, for example records of risk assessments, meetings, security briefings, emails/memos confirming safety requirements, advising of additional controls, method statements etc. If this is not available, tutors should consider setting an assignment/case study based on a real event, either one from the past or one to be held in the near future. Learners should complete documentation relating to health, safety and security assessment and control for the case study event.

If learners are in an employment situation or on a work placement, it should be possible to observe them undertaking risk assessments for an event. They may also be observed discussing health, safety and security issues with colleagues, emergency services officers and local authority officers. Assessors may be able to observe the learner at an event, monitoring health, safety and security.

Witness testimony from colleagues, suppliers, contractors, officials, managers, customers/visitors could be obtained verbally to confirm learners' scope of understanding of their responsibilities for ensuring health, safety and security at events.

Additional evidence of knowledge and understanding may be gathered through professional discussion with learners. They should be encouraged to bring evidence of their performance to the discussion, so that this may be referred to as validation.

Simulations, including role play, for example debriefing after an incident or issue at an event, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that these are valid, fair and reliable as a source of evidence.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. These should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of knowledge and understanding in a work-related setting.

Suggested resources

Textbooks

HSE – *Event Safety Guide* (HSE, 1999) ISBN 978-0-71762-453-9

HSE – *Fairgrounds and Amusement Parks: Guidance on Safe Practice* (HSE, 2007)
ISBN 978-0-71766-249-4

HSE – *Guide to Fire Precautions in Existing Places of Entertainment and like Premises* (HSE, 1999) ISBN 0-11-341072-7

HSE – *Guide to Risk Assessment* (HSE, 2011) ISBN 978-0-71766-440-5

HSE – *Managing Contractors: A Guide for Employers* (HSE, 2011)
ISBN 978-0-71766-436-8

HSE – *The Radiation Safety of Lasers Used for Display Purposes* (HSE, 1996)
ISBN 978-0-71760-691-7

Silvers J – *Risk Management for Meetings and Events* (Butterworth-Heinemann, 2007) ISBN 978-0-75068-057-8

Tarlow P – *Event Risk Management and Safety* (Wiley, 2002)
ISBN 978-0-47140-168-1

Websites

www.hsdirect.co.uk/free-info/method-statement.html

What is a method statement and help on how to write one

www.hse.gov.uk/pubns/indg163.pdf

Five steps to risk assessment

www.secc.co.uk/organise/downloads/event-risk-assesment-template.aspx

Risk assessment templates

Unit 5: Understanding Event Setup and Breakdown

Unit reference number: R/600/8553

Level: 3

Credit value: 3

Guided learning hours: 17

Unit aim

This unit requires learners to understand what is involved in event setup and breakdown. This process will vary in complexity depending on the type of event and the venue for the event. Learners need to understand the differences and the importance of effective planning in order to ensure a smooth and efficient operation that minimises disruption and impact to the venue and the locality. The importance of maintaining good communications with those involved in setup and breakdown is emphasised.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to oversee the setup and breakdown of an event	1.1	Explain the importance of managing setup and breakdown effectively	<ul style="list-style-type: none"> Importance of managing setup and breakdown effectively: to meet contractual agreements, to minimise impact on the venue, to reduce disruption to the locality, to ensure safety requirements are met, to avoid damage to equipment, facilities and property
		1.2	Explain the main stages involved in setup and breakdown	<ul style="list-style-type: none"> Main stages involved in setup and breakdown: dismantling of equipment and items, packing ready for transportation, loading onto transport, removing off site, clearing the area, cleaning and restoring the area; the range of equipment, staging and event items which need setup and breakdown, e.g. stages, lighting and sound towers, dance floors, tables, seating, viewing platforms, podiums, marquees and tents, catering points, toilet facilities, rest rooms, first-aid and medical points Different setup and breakdown requirements for different types of events and for different types of venues
		1.3	Explain the importance of having clear plans for setup and breakdown	<ul style="list-style-type: none"> Importance of having clear plans for setup and breakdown: so that equipment and items are brought onto site and removed from site sequentially to maximise access and minimise disruption; so that everyone involved is clear about the timescales for setup and breakdown; so that any delays can be identified and action taken
		1.4	Explain why it is important to follow plans for setup and breakdown as agreed	<ul style="list-style-type: none"> Importance of following plans for setup and breakdown as agreed: so that those involved follow timings, procedures and protocols; to ensure licensing conditions, legal requirements are complied with; to ensure insurance requirements are not breached; to minimise disruption at the event venue, to reduce the impact on the locality

Learning outcomes		Assessment criteria	Unit amplification
		1.5 Describe the information needed about event plans and resources to manage setup and breakdown	<ul style="list-style-type: none"> □ Information needed about event plans and resources to manage setup and breakdown: access, time available, staffing and equipment resources required, security controls, contingency plans
		1.6 Describe the main contractual obligations relevant to setup and breakdown	<ul style="list-style-type: none"> □ Obligations to the event sponsors, promoters, the contractors □ Obligations to complete within the allotted and agreed times, to ensure minimal disruption, to avoid damage, loss or breakdown
		1.7 Describe the main health and safety requirements relevant to setup and breakdown	<ul style="list-style-type: none"> □ Health and safety requirements relevant to setup and breakdown: the range of legal requirements, e.g. for safe use and handling of equipment, safe working at height, electrical connections and disconnections, use of fork-lift trucks, handling and storing food, using packaging and wrapping equipment; the competencies of staff involved to carry out setup and breakdown; access required to complete setup and breakdown
		1.8 Describe five typical problems that may occur during setup and breakdown	<ul style="list-style-type: none"> □ Typical problems that may occur during setup and breakdown: severe weather, power failures, injuries to personnel, equipment malfunction, security threats, insufficient resources to handle equipment, staging or materials, inadequate access, delays to scheduled activities □ Problems vary depending on the type of event and the venue: classic or pop music concerts, music festivals, conferences, banquets, sports events, presentations, firework displays, street parties; events in purpose-built arenas and venues, sites not designed for public entertainment, open-air stadiums, parks and greenfield sites
		1.9 Explain how to respond to five typical problems that may occur during setup and breakdown	<ul style="list-style-type: none"> □ Responding effectively to problems: following procedures and organisational guidelines, notifying persons responsible, reporting accurately, adapting to meet particular circumstances, considering implications of different problems to setup or breakdown scheduling

Learning outcomes		Assessment criteria		Unit amplification
		1.10	Explain the importance of checking resources during setup and breakdown	<ul style="list-style-type: none"> □ Importance of checking resources during setup and breakdown: to ensure adequate staffing, equipment, facilities; to ensure correct equipment, e.g. appropriate for the event; to ensure equipment, items are undamaged and in working order; to ensure personnel are competent
		1.11	Explain how to ensure the proper checking of resources during setup and breakdown	<ul style="list-style-type: none"> □ Checking by personal observation and discussion, by using CCTV; by seeking confirmation from contractors, responsible persons; by receiving reports via radio, phone or written format

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to work effectively with others during the setup and breakdown of an event	2.1	Describe the roles of people who will be involved in setup and breakdown	<ul style="list-style-type: none"> □ Roles of people involved: the different people, e.g. caterers and hospitality, security, contractors, event sponsors, venue staff □ Important to understand the different roles so that communication is appropriate and effective during setup and breakdown
		2.2	Explain the importance of presenting a positive image of oneself and one's organisation during setup and breakdown	<ul style="list-style-type: none"> □ Importance of presenting a positive image of both yourself and your organisation during setup and breakdown: to provide reassurance; to create trust; to maintain the organisation's reputation; to promote a calm working atmosphere
		2.3	Describe a range of ways of presenting a positive image of oneself and one's organisation during setup and breakdown	<ul style="list-style-type: none"> □ Ways of presenting a positive image: effective communication; appropriate appearance, meeting organisational standards and codes of dress; using appropriate and non-offensive language; being on time to monitor the setup and breakdown; answering queries courteously; dealing with problems calmly and professionally; being knowledgeable of the details of setup and breakdown schedules
		2.4	Define what is meant by 'customer' in the context of setting up and breaking down an event	<ul style="list-style-type: none"> □ Internal customer: event team staff, venue owners or managers, contractors, performers, security staff □ External customer: the event sponsor, local community groups, local authority officers; reinforcing key messages, issuing handouts where appropriate
		2.5	Explain how to provide optimum levels of customer service during setup and breakdown	<ul style="list-style-type: none"> □ Optimum levels of customer service during setup and breakdown: how to provide this by maintaining regular communication with customers; through ensuring problems are dealt with effectively; by advising customers promptly of delays, difficulties or other problems; by seeking their agreement to changing plans; by anticipating customer needs through careful profiling, by planning to meet changing demands

Learning outcomes		Assessment criteria		Unit amplification
		2.6	Explain the typical range of internal and external customers in the context of setup and breakdown	<ul style="list-style-type: none"> □ Internal customers: event team staff, venue owners or managers, contractors, performers, security staff □ External customers: the event sponsor, local community groups, local authority licensing and environmental health officers □ Range of customers who may need to be consulted for setup and breakdown, e.g. to discuss timing, safety, security issues
		2.7	Identify who needs to be communicated with during setup and breakdown	<ul style="list-style-type: none"> □ Internal customers: event team staff, venue owners or managers, contractors, performers, security staff □ External customers: the event sponsor, local community groups, local authority officers □ Importance of identifying and prioritising who needs to be communicated with during setup and breakdown so that information is received on time, e.g. to discuss schedules for setup and breakdown, safety, security issues
		2.8	Explain the importance of briefing and debriefing personnel during setup and breakdown	<ul style="list-style-type: none"> □ The importance of briefing personnel during setup and breakdown: to ensure agreed plans are understood, to ensure reporting responsibilities are understood, to clarify complex situations or instructions, to explain any changes required to normal procedures, to remind personnel of any restrictions or requirements, e.g. noise, nuisance, equipment usage, the need to clear or clean specific areas, the sequence of the setup and breakdown □ Importance of debriefing personnel during setup and breakdown: to receive feedback on performance, to review incidents or problems, to make changes or improvements

Learning outcomes		Assessment criteria		Unit amplification
		2.9	Describe how to brief and debrief personnel effectively	<ul style="list-style-type: none"> □ Importance of using appropriate and effective communication methods: so that accurate information is passed quickly to the correct people; ensuring that others can understand information and make judgements; using different communication styles to meet different needs; using clear language; using handouts or visual aids, e.g. maps or plans, photos to reinforce key messages related to the event, using correct protocols to ensure that confidential information is communicated only to those entitled to know, e.g. security staff, emergency services □ Keeping appropriate records of briefings, ensuring key personnel understand any additional responsibilities; gathering information and feedback from personnel; using information from external sources to validate feedback

Information for tutors

Delivery

This unit links with units on event implementation, effective working relationships and health, safety and security in the events industry.

This unit should be delivered in a way that develops knowledge and understanding of the impact and importance of safe and efficient setup and breakdown processes on the success of an event.

Learners need to know and understand:

- the importance of managing setup and breakdown effectively
- the information needed to be able to manage the process effectively
- the risks and problems that could arise during setup and breakdown
- the roles of people involved in setup and breakdown
- how to ensure communications are appropriate and effective
- the safety requirements that must be complied with

It is suggested that tutors combine delivery of this unit with activities related to health, safety and security, event implementation and establishing working relationships. Learners could be asked to identify two events with different requirements for equipment and facilities, for example stages, lighting and sound towers, dance floors, tables, seating, viewing platforms, podiums, marquees/tents, catering points, toilet facilities, rest rooms, first-aid/medical points etc. Groups could draw up a plan of their chosen event site and enter details of the possible locations of equipment and facilities. Attention should be paid to entry and egress access points as well as potential hazards or issues the venue may present. At least five potential hazards or problems should be considered. Tutors should take feedback on a flipchart or board and then share the findings of individual groups.

An assignment or case study could then be developed so that learners prepare a mind map of the personnel involved in setup and breakdown for their selected event. A timetable for setup and breakdown of the various equipment and facilities should be drawn up, indicating where this is to be completed concurrently or sequentially. Learners should be encouraged to adopt a systematic and defined approach, using project management techniques. The use of Gantt charts is strongly recommended. This could be summarised via a presentation. The presentation could also include an evaluation of environmental and community impact of the planned setup and breakdown.

Knowledge of the process gained through active involvement rather than through a purely theoretical context is important. Wherever possible, learners should have the opportunity to work with event management professionals or those involved in events so that they can experience the different aspects and how these contribute to the overall operation of the event. This could be as an event volunteer.

Assessment

Learners must meet all assessment criteria to pass the unit.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. These should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria across different, linked units.

If the learner is in an employment situation or on a work placement, it should be possible to observe them undertaking event-planning meetings where setup and breakdown are discussed and planned, or monitoring and managing the actual process at an event.

The main source of evidence for this unit is likely to be product evidence derived from planning an event (for example records or minutes from event-planning meetings, briefings to contractors and other personnel involved in setup and breakdown, emails to suppliers, contractors, officials etc) or from the assignment/case study outlined above.

Where the learner has a role working on an event, witness testimony from colleagues, suppliers, contractors, officials, managers, customers/visitors could be obtained verbally to provide evidence of organisational skills during setup and breakdown.

Additional evidence of knowledge and understanding can be gathered through professional discussion with learners. They should be encouraged to bring evidence of their performance to the discussion, so that this may be referred to as validation.

Simulations, including role play, for example briefing contractors, security and other event staff on setup or breakdown should be as realistic as possible and should be discussed with the Standards Verifier to ensure that this is valid, fair and reliable as a source of evidence.

Suggested resources

Textbooks

Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013)
ISBN 978-1-11859-112-3

HSE – *Event Safety Guide* (HSE, 1999) ISBN 978-0-71762-453-9

HSE – *Fairgrounds and Amusement Parks: Guidance on Safe Practice* (HSE, 2007)
ISBN 978-0-71766-249-4

HSE – *Guide to Fire Precautions in Existing Places of Entertainment and like Premises* (HSE, 1999) ISBN 0-11-341072-7

HSE – *Guide to Risk Assessment* (HSE, 2011) ISBN 978-0-71766-440-5

HSE – *Managing Contractors: A Guide for Employers* (HSE, 2011)
ISBN 978-0-71766-436-8

Silvers J – *Risk Management for Meetings and Events* (Butterworth-Heinemann, 2007) ISBN 978-0-75068-057-8

Tarlow P – *Event Risk Management and Safety* (Wiley, 2002)
ISBN 978-0-47140-168-1

Journals and/or magazines

Event Organiser (The Event Services Association)

International Journal of Contemporary Hospitality Management (Emerald Group Publishing Ltd)

International Journal of Event and Festival Management (Emerald Group Publishing Ltd)

International Journal of Event Management Research (Emerald Group Publishing Ltd)

International Journal of Hospitality and Event Management (Emerald Group Publishing Ltd)

Journal of Hospitality, Leisure, Sport and Tourism Education (Elsevier)

Websites

www.businessballs.com/project.htm Free ethical learning and development resources

www.pmi.org/About-Us/About-Us-What-is-Project-Management.aspx Project Management Institute

www.hsdirect.co.uk/free-info/method-statement.html What is a method statement and help on how to write one

www.hse.gov.uk/pubns/indg163.pdf Five steps to risk assessment

Unit 6: Understanding How to Manage the Running of an Event

Unit reference number: Y/600/8554

Level: 4

Credit value: 4

Guided learning hours: 25

Unit aim

This unit requires learners to understand how to manage the running of events from two contrasting sectors, for example sport, music, public banquet, conference and public entertainments such as firework/sound and light displays.

Learners will be required to demonstrate how to follow event plans, organise and lead event staff, and deal with problems that arise. An essential part of this is knowing how to communicate effectively with others involved in the events. Managing change and emerging issues during an event is an essential skill.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand how to manage the running of an event	1.1	Explain the importance of following agreed plans for an event	<ul style="list-style-type: none"> Importance of following agreed plans for an event: so that those involved follow timings, procedures and protocols; to ensure licensing conditions, legal requirements are complied with; to ensure insurance requirements are not breached; ensuring responsibilities for the different areas of the event are clearly understood, e.g. security, hospitality, entry and ticketing, contractors, crowd control
		1.2	Describe the processes used to monitor the running of an event	<ul style="list-style-type: none"> How to monitor how well the event is running: by checking the different areas, e.g. by personal observation, via phone or radio reports, using CCTV, through receiving confirmation from those with designated responsibility for the different areas
		1.3	Explain why it is important to provide authorisation for each stage of an event	<ul style="list-style-type: none"> Importance of providing authorisation for each stage of the event: to meet licensing requirements, to enable responsible persons to check safety and security requirements have been met for each stage, to ensure that timetabled tasks have been completed in accordance with the operational plan before moving on to the next stage; to provide an opportunity to agree specific actions or changes completed with emergency services, licensing authority officers
		1.4	Describe the processes they should follow to provide authorisation for different stages of an event to go ahead	<ul style="list-style-type: none"> Processes that should be followed to provide authorisation for different stages of an event to go ahead: responsible persons able to sign off different stages, e.g. Site Safety Coordinator, Chief Security officer, Fire Safety Officer, Licensing officer; correct documentation to complete for each stage; correct format to notify others of authorisation, e.g. verbal confirmation, email, signed document

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to work with others when managing an event	2.1	Describe the typical management arrangements for an event	<ul style="list-style-type: none"> □ Typical management arrangements for an event: defining a hierarchy to control each aspect of the event, setting out reporting arrangements and methods, designating responsible officers or persons for each aspect, setting out roles and responsibilities; detailed processes to be adopted to maintain safety, e.g. safe systems of work, safe access, provision of information, training and consultation with employees, responsibilities of the Site Safety officer, liaison with licensing authority officers, emergency services officers

Learning outcomes	Assessment criteria	Unit amplification
	2.2 Describe the roles and responsibilities of people involved in the management arrangements for an event, including external organisations	<ul style="list-style-type: none"> □ Roles and responsibilities: the importance of setting out roles and responsibilities clearly and agreeing them in advance of the event so that everyone involved is clear about their own and others' roles, so that extent of individual remit is set out, so that reporting lines are clear □ Roles and responsibilities of the range of people involved in managing an event, e.g. site safety coordinator who is responsible for managing and monitoring safety of the event □ Commissioning agents who are responsible for arranging the performers at an event and how the event will be promoted and marketed □ Performers who are responsible for complying with the site safety rules and for using equipment and facilities safely □ Facility owners and managers who have a duty of care to the public and are responsible for the safety of those attending or working at the event □ Contractors who are responsible for ensuring their equipment meets safety requirements and that they comply with site safety rules, e.g. staff competencies, keep to agreed setup and breakdown arrangements □ Suppliers who are responsible for complying with site safety rules, for delivering as scheduled □ Security officials who are responsible for maintaining security of all areas of the event, e.g. searching for prohibited items, taking action to eject individuals, controlling unauthorised behaviour, maintaining restricted areas, emergency access points and routes □ Emergency services who are responsible for agreeing event contingency plans, for liaising with the event supervisor and for providing fire, ambulance or police presence □ Licensing authority officers who have responsibilities for ensuring the event complies with the licence issued, that noise and environmental impact are acceptable

Learning outcomes		Assessment criteria		Unit amplification
		2.3	Explain the importance of effective communication during an event	<ul style="list-style-type: none"> □ Effective communication during an event: the importance of using appropriate and effective communication methods so that accurate information is passed quickly to the correct people; ensuring that others can understand information and make judgements; using different communication styles to meet different needs □ Protocols to ensure that confidential information is communicated only to those entitled to know, e.g. security staff, emergency services
		2.4	Explain the processes to use to communicate during an event	<ul style="list-style-type: none"> □ Processes to use to communicate during an event: disseminating information to key personnel, issuing clear and concise instructions, sending and receiving reports, confirming authorised checks made, confirming activities completed, using agreed protocols and codes to pass on information; communicating via radio, phone, video screen, display signs, face to face; the importance of selecting the most appropriate method of communication for the situation, e.g. taking into account speed, the need for secure communication, the recipients of the communication
		2.5	Describe the principles of effective leadership during an event	<ul style="list-style-type: none"> □ Principles of effective leadership: the three areas of leadership, i.e. strategic, operational and team; how to use different styles of leadership to suit different situations or different people, being aware of own strengths, being committed to the event organisation's vision, striving for excellence in own and others' performance of work tasks, being determined and persistent, e.g. in resolving problems, overcoming difficulties, setting clear goals for self and others to work towards, leading by example, e.g. adopting standards of behaviour for others to follow, having consistent principles, ethics and values

Learning outcomes		Assessment criteria		Unit amplification
		2.6	Explain the importance of effective leadership during an event	<ul style="list-style-type: none"> □ Importance of effective leadership during an event: to reassure staff and those attending the event, to provide direction, to motivate and encourage staff dealing with difficulties, to make decisions, to anticipate and respond to problems, to take responsibility during incidents and emergencies, to organise resources efficiently and effectively, e.g. deployment of staff, management of time, control of budget

Learning outcomes		Assessment criteria		Unit amplification
3	Understand how to deal with problems and manage change during an event	3.1	Identify the typical types of problems that may occur during an event	<ul style="list-style-type: none"> Types of problems that may occur during an event, e.g. severe weather, power failures, trip and fall hazards, lack of or breakdown in facilities, equipment malfunction or collapse, crowd surge, crowd disturbance, vandalism, ticketing issues, theft, missing persons, transport disruption, security incidents and threats
		3.2	Explain how to respond effectively to problems that may occur during the running of an event	<ul style="list-style-type: none"> Responding effectively to problems: following procedures and organisational guidelines, notifying persons responsible, reporting accurately and in the agreed format, adapting to meet particular circumstances, remaining calm and reassuring to members of the public and event staff, being decisive
		3.3	Explain why it's important to manage change during an event	<ul style="list-style-type: none"> Managing change during an event: the importance of managing change during an event, to respond appropriately so that the event is not disrupted, so that event staff are given clear direction and leadership to deal with changing schedules or requirements, so that those attending the event are reassured, so that good working relationships are maintained Types of changes that might occur during an event, e.g. higher than anticipated crowd numbers, security breaches or clearance issues, severe weather, power failures, breakdown in facilities, equipment malfunction, structure collapse, crowd surge, crowd disturbance, missing persons, delays, vandalism or damage to equipment, facilities or areas, staff illness
		3.4	Explain the processes involved in change management	<ul style="list-style-type: none"> How to manage change effectively: selecting the most appropriate communication methods so that others understand the need for actions to manage change, ensuring that communications are timely and inclusive, identifying and dealing with sensitive issues; following correct organisational guidelines, reporting changes and actions taken, recommending further actions to deal with developments

Learning outcomes		Assessment criteria	Unit amplification
		3.5 Explain why it is important to communicate any changes and developments during an event	<ul style="list-style-type: none"> Importance of communicating changes and developments during an event: so that those attending the event are reassured, so that event staff can adapt their activities, e.g. move to another area, summon assistance, provide directions, so that contractors, suppliers and performers can amend plans, so that emergency services can update contingency arrangements
		3.6 Explain the processes to follow to communicate changes and developments during an event	<ul style="list-style-type: none"> Range of methods that may be used to communicate changes and developments during an event to event staff and others such as emergency services, performers, contractors, e.g. briefings, handouts, route-marking and signs, information displays, screens, scoreboards, face-to-face contact, PA systems, radio systems, loud hailer; using agreed protocols for communications; having accurate site plans or maps with clear coding of areas so that the impact of changes and developments can be assessed

Information for tutors

Delivery

This unit links to units on planning an event, health, safety and security, and establishing effective working relationships.

This unit should be delivered in a way that develops knowledge and understanding of the cohesive nature of managing an event and the importance of following plans and procedures to achieve a successful outcome.

Learners need to know and understand:

- the importance of following plans for the event
- how to monitor against the plans and to identify when to intervene to ensure these are followed
- the roles and responsibilities of various personnel at an event and the importance of ensuring these are clearly understood
- methods of communication with personnel during an event
- how to respond to problems and issues as these arise
- how to manage changes to event plans

It is suggested that tutors combine delivery of this unit with activities related to health, safety and security, establishing working relationships and planning an event.

A useful opening would be through small-group discussions, during which learners can exchange their experiences of attending different events, for example music festival or concert – indoor/outdoor, sports event – indoor/outdoor, single or multiple locations, banquet, presentation, public meeting etc, both in this country and overseas. The discussion should focus on how the events were managed, how effective communications during the event were, how well learners were guided or supported at the event by various event personnel and how changes, issues such as delays, disruptions or incidents such as crowd disturbance or equipment failure during the event were handled. Tutors can take feedback on a flipchart or board and then share the findings of individual groups.

An assignment could include preparing a detailed operational plan for two events from contrasting sectors, for example sport and music, conference and charity fundraising. Learners could be asked to assume different roles and to set out the roles and responsibilities for these. Groups could discuss the interrelationship of the various roles. Using the internet to research examples would help learners to understand the range of aspects that need to be considered in order to maintain effective communication to those involved, and what might prevent this communication. Alternatively, learners may have ideas for actual events that they intend to initiate and use these as the basis for the above exercise. Tutors should ensure that the chosen events have sufficient contrast for the purposes of this unit.

The assignment or case study could then be developed to consider how problems or contingencies might be dealt with. Learners should be asked to prepare a chart or graphic to illustrate reporting responsibilities for different contingencies.

Knowledge of event management gained through active involvement rather than through a purely theoretical context is key. Wherever possible, learners should have the opportunity to interact with event management professionals, for example through presentations, workshops or work shadowing, so that they can discuss how events are monitored using operational plans, and how these plans are adapted to meet changing demands. This may be through work shadowing.

Assessment

Learners must meet all assessment criteria to pass the unit.

Assessment should be planned to ensure efficient and effective gathering of evidence, through integrated tasks and activities. These should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria across several linked units. Centres are encouraged to emphasise the practical application of knowledge and understanding in a work-related setting.

If learners are in an employment situation or on a work placement, it should be possible to observe them managing an event, briefing staff, dealing with problems and contingencies and adapting plans.

The best source of evidence for this unit is likely to be product evidence derived from their role in event management, for example records of briefings, event plans, incident reports from different events. Witness testimony from colleagues, suppliers, contractors, officials, managers, customers/visitors could be obtained verbally to provide evidence of leadership qualities, ability to respond to problems and decision-making skills.

Where learners rely on an assignment, such as that outlined above, it is recommended that this is an integrated assignment that covers planning, running and evaluating an event.

Additional evidence of knowledge and understanding may be gathered through professional discussion with learners. They should be encouraged to bring evidence of their performance to the discussion, so that this may be referred to as validation.

Simulations, including role play, for example debriefing after an incident or issue at an event, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that these are valid, fair and reliable as a source of evidence.

Suggested resources

Textbooks

Adair J – *How to Grow Leaders: The Seven Key Principles of Effective Leadership Development* (Kogan Page, 2009) ISBN 978-0-74945-480-7

Bowdin G, Allen J, O'Toole W, Harris R, McDonnell I – *Events Management* (Routledge, 3rd edition, 2011) ISBN 978-1-85617-818-1

Brounstein M – *Communicating Effectively for Dummies* (J. Wiley & Sons, 2001) ISBN 978-0-76455-319-6

Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013) ISBN 978-1-11859-112-3

Gaur S – *Event Marketing and Management* (Vikas Publishing House, 2009) ISBN 978-8-12591-449-5

Goldblatt J – *Special Events: Best Practices in Modern Event Management* (Van Nostrand Reinhold, 2nd edition, 1997) ISBN 0-442-02207-7

HSE – *Event Safety Guide* (HSE, 1999) ISBN 978-0-71762-453-9

HSE – *Fairgrounds and Amusement Parks: Guidance on Safe Practice* (HSE, 2007) ISBN 978-0-71766-249-4

HSE – *Guide to Fire Precautions in Existing Places of Entertainment and like Premises* (HSE, 1999) ISBN 0-11-341072-7

HSE – *Guide to Risk Assessment* (HSE, 2011) ISBN 978-0-71766-440-5

HSE – *Managing Contractors: A Guide for Employers* (HSE, 2011) ISBN 978-0-71766-436-8

HSE – *Managing Crowds Safely: A Guide for Organisers at Events and Venues* (HSE, 2000) ISBN 978-0-71761-834-7

O'Hara B, Beard M – *Music Event and Festival Management* (Wise Publications, 2006) ISBN 978-1-92102-973-8

Shone A, Parry B – *Successful Event Management* (Cengage Learning EMEA, 2004) ISBN 978-1-84480-076-6

Van der Wagen L – *Human Resource Management for Events: Managing the Event Workforce* (Butterworth-Heinemann, 2006) ISBN 978-0-75066-998-6

Watt D – *Event Management in Leisure and Tourism* (Addison Wesley Longman Ltd, 1998) ISBN 0-582-35706-3

Journals and/or magazines

Event Organiser (The Event Services Association)

International Journal of Contemporary Hospitality Management (Emerald Group Publishing Ltd)

International Journal of Event and Festival Management (Emerald Group Publishing Ltd)

International Journal of Event Management Research (Emerald Group Publishing Ltd)

International Journal of Hospitality and Event Management (Emerald Group Publishing Ltd)

Journal of Hospitality, Leisure, Sport and Tourism Education (Elsevier)

Websites

www.businessballs.com/project.htm	Free ethical learning and development resources
www.hsdirect.co.uk/free-info/method-statement.html	What a method statement is and help on how to write one
www.hse.gov.uk/pubns/indg163.pdf	Five steps to risk assessment
www.pmi.org/About-Us/About-Us-What-is-Project-Management.aspx	Project Management Institute

Unit 7: Understanding Event Evaluation and Reporting

Unit reference number: D/600/8555

Level: 3

Credit value: 3

Guided learning hours: 18

Unit aim

This unit sets out the basic principles required to evaluate and report on an event. Learners should understand the criticality of using evaluation to continuously improve performance. They will demonstrate how to gather and analyse information covering all aspects of an event against the critical success factors for their organisation. In doing so, they will ensure their evaluation is thorough, effective and meaningful and that findings impact on management of future events.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the principles of evaluating an event	1.1	Explain the importance of evaluating and reporting on an event	<ul style="list-style-type: none"> □ Importance of evaluating an event: to improve or maintain the organisation's reputation, ensure safety, gain public confidence, improve efficiency and effectiveness
		1.2	Explain the role that evaluation plays in continuous performance improvement for their own organisation and for other stakeholders	<ul style="list-style-type: none"> □ Role of evaluation: how evaluation is critical to achieving continuous improvement for managing future events; how the evaluation process defines criteria for judging success of an event, the information and data needed and the use to which this will be put; how decisions on future events are influenced by evaluation reports; why it is important that evaluations are systematic and thorough so that there is confidence in the findings
		1.3	Describe the principles and methods involved in evaluation	<ul style="list-style-type: none"> □ Principles and methods of evaluation: using qualitative and quantitative methods □ Qualitative methods are using narrative or descriptive data such as views and attitudes, feedback from customers, sponsors, performers, other stakeholders □ Quantitative methods are using numerical data such as ticket sales, audience numbers, revenue □ Evaluation may be direct, e.g. customer surveys, personal observation or indirect, e.g. comments via social media sites, follow-on sales, repeat bookings, customer enquiries □ Why it is important to include stakeholders in evaluation of an event

Learning outcomes		Assessment criteria		Unit amplification
		1.4	Explain why it is important to identify and use critical success factors when evaluating events	<ul style="list-style-type: none"> □ Identifying and using critical success factors: how to identify critical success factors which are important to the organisation, the aspects by which the organisation judges its success in event management, how these are translated into measurable performance indicators, who has responsibility for monitoring these, how they should be recorded and reported upon

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to evaluate an event	2.1	Describe the specific processes involved in evaluating events in their sector	<ul style="list-style-type: none"> Processes of evaluating an event: debriefing meetings, reviews with key staff, key stakeholders, e.g. suppliers, contractors, local authority officers, emergency services; obtaining and preparing data and information in suitable formats; obtaining and collating opinions and feedback at the event, after the event, e.g. from customers, delegates, clients, staff, volunteers; using surveys, gathering online feedback, e.g. on social networking sites, YouTube; summarising aspects of success and areas for improvement; reporting against critical success factors
		2.2	Identify the main relevant legal and regulatory requirements that apply to the evaluation of events in their sector	<ul style="list-style-type: none"> Legal and regulatory requirements that apply to the evaluation of events: health and safety legislation, environmental health legislation, welfare requirements, food safety legislation, first aid and medical provision; traffic management, fire and emergency services access; sports events legislation
		2.3	Explain how to choose financial and non-financial critical success factors	<ul style="list-style-type: none"> Financial and non-financial critical success factors: key areas that are targeted by the organisation, e.g. event management procedures, IT systems for management, sales, promotion, security, employee skills How these factors may differ depending on the type of event; how to identify, select and prioritise these for an event in terms of organisational aims, in terms of legal requirements; who to consult to check current priorities
		2.4	Describe the main information sources that can be used to evaluate an event	<ul style="list-style-type: none"> Information sources: sources from within the organisation, sources from outside the organisation; direct and indirect information, e.g. from direct observation or involvement, data from tickets and entry points, feedback from customers, event officials, emergency services, public authority officers, suppliers, performers, broadcasters
		2.5	Explain how to access relevant information sources	<ul style="list-style-type: none"> How to access relevant information sources: obtaining information from sources from within the organisation, sources from outside the organisation, e.g. by email, phone, event briefings, collated data, government data, internet sites, trade journals

Learning outcomes		Assessment criteria		Unit amplification
		2.6	Explain why it is important to verify information used for evaluation	<ul style="list-style-type: none"> Why it is important to verify information used for evaluation: to reduce or eliminate errors, to ensure that information is current, accurate and complete; so that conclusions based on the data are valid, so that decisions that follow the evaluation can be made with confidence; why it is important to do so before presenting summary findings with judgements
		2.7	Describe how to verify information sources	<ul style="list-style-type: none"> How to verify information sources: by cross checking data and information sources, e.g. through back working data, by questioning key sources, by using a mix of qualitative and quantitative data and information, by comparing with data from independent sources such as government agencies, by seeking advice from independent experts
		2.8	Describe the different types of information that can be used and their relative value to an evaluation	<ul style="list-style-type: none"> Different types of information that can be used and their relative value to an evaluation: information received, e.g. by email, phone, event briefings, collated data from suppliers, officials, direct and indirect feedback from clients and customers, feedback on internet sites, video footage of the event; how to weight information depending on source, extent or frequency, experience and expertise, factors that may have influenced feedback or data, e.g. personal opinions, problems at or before the event
		2.9	Explain the processes for collating and analysing event information	<ul style="list-style-type: none"> Collating and analysing event information: how to analyse information by breaking down data to identifiable sources; assessing or comparing data from previous events or from similar events held elsewhere; analysing data from different sources; comparing projected spend against actual to predict profit or loss; reviewing income and expenditure under event budget sub-headings, e.g. hospitality, security, transport, facility costs, emergency and support services

Learning outcomes		Assessment criteria		Unit amplification
3	Understand how to report on the evaluation of an event	3.1	Describe the key components that should appear in an evaluation report	<ul style="list-style-type: none"> □ Key components in an evaluation report: detailed and summary information on the event under headings, e.g. date, type, venue, attendance, event manager, key officers, financial summary, feedback received, sales, promotion, security, hospitality, facility, emergency and support services, event staffing and volunteers; assessment against critical success factors for the event; areas of concern; recommendations for improvements
		3.2	Explain who evaluation reports should be disseminated to	<ul style="list-style-type: none"> □ Dissemination of the evaluation report: who evaluation reports should be disseminated to within the organisation, e.g. managers, team leaders, site safety officer; outside the organisation, e.g. emergency services, sponsors and promoters, licensing authority, chief security officer, stakeholders such as community groups; following the agreed format for reports to external and internal recipients; redacting confidential information before external dissemination; following agreed protocols, e.g. when to send copies to Committee Chairs or senior managers
		3.3	Explain how to disseminate evaluation reports	<ul style="list-style-type: none"> □ How to disseminate evaluation reports, e.g. by email, hard copy, by presentation, by video link, using intranet facilities; following agreed organisational protocols, prioritising recipients, ensuring reports are sealed or marked appropriately for dissemination; redacting confidential information before external dissemination; following the agreed timescale for disseminating the evaluation report

Learning outcomes		Assessment criteria	Unit amplification
		3.4 Explain the importance of confidentiality	<ul style="list-style-type: none"> □ Importance of confidentiality and the implications if this is disregarded: how some information in the report may be protected under the Data Protection Act, the implications if this is breached, i.e. damage to persons, loss of privacy or reputation □ How some information must remain confidential to maintain security and safety, e.g. details of security plans and resourcing, access routes for performers, the implications if this information is not kept confidential □ How information on other aspects such as ticketing, revenue or other financial aspects must remain confidential to protect the organisation's business and reputation □ Why it is important to keep some information confidential, e.g. advance information on potential performers, merchandising, environmental impact assessments of using certain venues to avoid adverse publicity, to avoid unauthorised merchandising, to protect venues
		3.5 Identify what types of information might be confidential	<ul style="list-style-type: none"> □ What types of information might be confidential, e.g. financial information, security issues, personal details of staff, members of the public, officers involved in the event
		3.6 Describe how to treat confidential information	<ul style="list-style-type: none"> □ How to treat confidential information to comply with organisational protocols, Data Protection requirements □ How to mark reports to restrict sight to named personnel

Learning outcomes		Assessment criteria		Unit amplification
4	Understand the organisational context for evaluating and reporting on the success of an event	4.1	Describe the extent of their own responsibilities for evaluation	<ul style="list-style-type: none"> □ Responsibilities for evaluation: how it is important to ensure accuracy and timeliness in providing the evaluation; how to ensure that information and feedback are gathered sensitively and professionally; who to check with to ensure information is gathered on time; why it is important to liaise with key stakeholders throughout the evaluation to maintain their support; ensuring organisational protocols, e.g. when contacting suppliers or officers, are maintained at all times
		4.2	Describe how their role relates to the roles of others in your organisation	<ul style="list-style-type: none"> □ How their role relates to others in the organisation: the range of colleagues and their roles who are involved in event planning and operation; colleagues include those at the same level, those at different levels, managers, colleagues at different sites, e.g. regional branches, overseas branches; the ways in which their role depends on the input and support of others; how their own role supports colleagues to perform their duties; the limits of their own responsibilities for others; their line management accountabilities
		4.3	Describe the main responsibilities of colleagues when evaluating an event and other organisations with whom they can liaise	<ul style="list-style-type: none"> □ Main responsibilities of colleagues when evaluating an event, how this must be agreed before the event; why this must be taken into account when gathering information and confirming findings, e.g. to ensure information is produced in the correct format, or to avoid delays □ How to liaise with other organisations to ensure the event evaluation is thorough, e.g. local authorities, emergency services, contractors, suppliers

Information for tutors

Delivery

This unit should be delivered in a way that develops knowledge and understanding of evaluation and reporting on different types of events. Learners need to know and understand:

- the importance of evaluation to improve event management and success
- how to identify information and data needed to be able to evaluate thoroughly
- the processes and protocols of their organisation in relation to reporting and liaison with external organisations
- the issues presented by different contexts of a range of events that could impact on their success
- the various legal and other requirements for different events
- how to evaluate an event against their organisation's critical success factors

A useful opening would be through small-group discussions, during which learners can exchange their experiences of attending different events, for example music festival or concert – indoor/outdoor, sports event – indoor/outdoor, single or multiple locations, public meeting etc, both in this country and overseas. The discussion should focus on what might have been the 'critical success factors' for the event/events. Learners should be encouraged to consider the main purposes and aims of the event/events under broad headings and then propose specific criteria against which they could succeed or otherwise. The discussion should endeavour to identify feedback that is both qualitative – for example their own opinions/reactions during and after the event – and quantitative – such as reports on the event giving details of audience numbers, incidents etc. Issues such as security, venue, facilities, transport, language, additional features should also be evaluated in terms of how they contributed to the success or otherwise of the event/events. Tutors can take feedback on a flipchart or board and then share the findings of individual groups.

Based on the above, learners should be asked to draw up a checklist of criteria for evaluating events. Using this checklist they should be encouraged to review two events from contrasting sectors, for example sport and music, conference and charity fundraising etc. This could include looking at video footage of events or discussing with event professionals.

Assignments or case studies could then be developed to focus on events that were successful or those that had issues. This research could be presented via a presentation and include an evaluation against possible critical success factors for the event, and options for improvement. Learners should identify any information in their evaluation report that would be confidential or restricted and explain why.

Knowledge of event management gained through active involvement rather than through a purely theoretical context, is important. Wherever possible, learners should have the opportunity to work with event management professionals or those involved in events so that they can experience the different aspects and how these contribute to the overall operation of the event. In doing so they will gain firsthand experience to add to the event evaluation assignment.

Assessment

Learners must meet all assessment criteria to pass the unit.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. For example, an assignment/project to research an event opportunity, plan the event and evaluate it would provide a coherent task that would cover several units.

If learners are in an employment situation or on a work placement, it should be possible to observe them undertaking event debriefings, thereby gaining direct evidence of their ability to evaluate effectively, weight the quality of the information and judge the relative importance of the information against the critical success factors for their organisation.

The predominant source of evidence for this unit is likely to be product evidence derived from their role in event management, for example records of sales, ticketing, hospitality data received, security briefings, feedback collated, minutes from event briefings, emails to suppliers, contractors, officials etc relating to an event, evaluation reports from different events. It is suggested that learners evaluate two events from contrasting sectors that differ in terms of size, type, client group etc.

Witness testimony from colleagues, suppliers, contractors, officials and managers could be obtained verbally to provide evidence of learners' thoroughness and accuracy of judgement when evaluating events.

Additional evidence of knowledge and understanding may be gathered through professional discussion with learners. They should be encouraged to bring any actual performance evidence to the discussion, so that this may be referred to as validation.

Simulations, including role play, for example planning for or debriefing after an event, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that this is valid, fair and reliable as a source of evidence. The simulation should be assessed through observation to provide evidence.

Suggested resources

Textbooks

Bowdin G, Allen J, O'Toole W, Harris R, McDonnell I – *Events Management* (Routledge, 3rd edition, 2011) ISBN 978-1-85617-818-1

Brounstein M – *Communicating Effectively for Dummies* (J. Wiley & Sons, 2001) ISBN 978-0-76455-319-6

Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013) ISBN 978-1-11859-112-3

Gaur S – *Event Marketing and Management* (Vikas Publishing House, 2009) ISBN 978-8-12591-449-5

Goldblatt J – *Special Events: Best Practices in Modern Event Management* (Van Nostrand Reinhold, 2nd edition, 1997) ISBN 0-442-02207-7

O'Hara B, Beard M – *Music Event and Festival Management* (Wise Publications, 2006) ISBN 978-1-92102-973-8

Watt D – *Event Management in Leisure and Tourism* (Addison Wesley Longman Ltd, 1998) ISBN 0-582-35706-3

Journals and/or magazines

Event Organiser (The Event Services Association)

International Journal of Contemporary Hospitality Management (Emerald Group Publishing Ltd)

International Journal of Event and Festival Management (Emerald Group Publishing Ltd)

International Journal of Event Management Research (Emerald Group Publishing Ltd)

International Journal of Hospitality and Event Management (Emerald Group Publishing Ltd)

Journal of Hospitality, Leisure, Sport and Tourism Education (Elsevier)

Websites

www.businessballs.com

Free ethical learning and development resources

Unit 8: Understanding Working Relationships in the Events Industry

Unit reference number: H/600/8556

Level: 3

Credit value: 4

Guided learning hours: 24

Unit aim

This unit focuses on developing productive working relationships with colleagues, within learners' own organisation, with other organisations and with identified stakeholders. It involves being aware of the roles, responsibilities, interests and concerns of colleagues and stakeholders and demonstrating how to work with and support them in various ways. The need to monitor and review the effectiveness of working relationships with colleagues and stakeholders is also a key requirement of this unit.

'Stakeholder' refers to individuals or organisations that have a material, legal or political interest in, or who may be affected by, the activities and performance of learners' organisations.

'Colleagues' are those with whom learners work, and may be at the same or another level within the organisation.

Essential resources

There are no special resources needed for this unit.

Learning outcomes, assessment criteria and unit amplification

To pass this unit, the learner needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes		Assessment criteria		Unit amplification
1	Understand the value of working relationships with colleagues and stakeholders during the planning and co-ordination of an event	1.1	Describe the types of colleagues with whom an events co-ordinator works	<ul style="list-style-type: none"> Types of colleagues: those within the organisation involved in planning and coordinating events; at the same level, at a different level; colleagues at the same site, colleagues at remote sites
		1.2	Explain the different roles and responsibilities that different colleagues have	<ul style="list-style-type: none"> Different roles and responsibilities of colleagues, e.g. contract negotiation, financial management, budget setting and monitoring, administration, marketing and sales, safety and licensing compliance, procurement, legal, customer liaison; the importance of knowing what different colleagues do and the part they play in planning and coordinating events; who to include when planning and coordinating events; the added value that effective working with colleagues can bring to event planning and coordination
		1.3	Explain the concept of 'stakeholder' in the context of an event	<ul style="list-style-type: none"> The concept of 'stakeholder' in the context of an event: individuals or organisations that have a material, legal or political interest in the event, those who may be affected by the event or related activities
		1.4	Describe the different types of stakeholders that might be relevant to an event	<ul style="list-style-type: none"> Different stakeholders for events, e.g. commissioning agents, performers, facility owners and managers, contractors, suppliers, security officials, emergency services, licensing authority officers, neighbourhood or local community members and groups, members of the public
		1.5	Evaluate the interests that different stakeholders may have in an event	<ul style="list-style-type: none"> Stakeholder interests: the range of financial, material, personal, political interests which different stakeholders may have; how these will differ depending on type and size of event, location; the possible conflicts of interest that may create issues; why it is important to assess these and evaluate their impact when planning and coordinating an event

Learning outcomes		Assessment criteria		Unit amplification
		1.6	Explain the importance of maintaining effective working relationships with colleagues	<ul style="list-style-type: none"> Importance of maintaining effective working relationships with colleagues to ensure cooperation in meeting requirements, e.g. health, safety and security, to encourage teamwork, to build commitment to achieving the event aims, to overcome problems, to ensure communication channels are open and direct, to promote pride in high standards of performance
		1.7	Explain the importance of maintaining effective working relationships with stakeholders	<ul style="list-style-type: none"> Importance of maintaining effective working relationships with stakeholders: to ensure cooperation in complying with site safety rules, to resolve problems, to overcome objections and concerns, to encourage joint commitment to achieving a successful event, to enable communication to be meaningful, to build rapport between different stakeholders

Learning outcomes		Assessment criteria		Unit amplification
2	Understand how to establish working relationships with colleagues and stakeholders during the planning and co-ordination of an event	2.1	Explain how to identify which colleagues and stakeholders an event organiser may need to work with	<ul style="list-style-type: none"> Identifying relevant colleagues and stakeholders: the importance of ensuring that all relevant colleagues and stakeholders are identified when planning an event; through seeking advice from experienced colleagues or stakeholders to confirm their possible relevance in planning an event; through researching similar events to identify potential stakeholders; by reading guidance from professional bodies, e.g. HSE, by reading cases studies of similar events
		2.2	Describe how to make contact with relevant colleagues and stakeholders	<ul style="list-style-type: none"> Making contact: making contact with colleagues and stakeholders via phone, email, using websites, sending letters and circulars, placing advertisements, notices; selecting the most appropriate means depending on requirements, e.g. urgency, confidentiality; how to prioritise contact with colleagues and stakeholders to ensure protocols are observed
		2.3	Describe how to agree working arrangements and communication methods with colleagues and stakeholders	<ul style="list-style-type: none"> Working arrangements and communication methods: selecting and defining appropriate working arrangements, e.g. meetings, line management responsibilities, authorisation levels, designating roles of key event personnel; the importance of doing so at an early stage in planning an event; when to use certain methods of communications, e.g. phone, email, text, letter; how to observe protocols when circulating information with colleagues and stakeholders, e.g. copying in, group circulations; when issues of security or confidentiality affect contact and communications with and between colleagues and stakeholders; how to ensure contact is secure and confidential, e.g. restricted circulation, need-to-know basis; why it is important to follow agreed methods of communications and contact with colleagues and stakeholders

Learning outcomes		Assessment criteria		Unit amplification
3	Understand how to maintain effective working relationships with colleagues and stakeholders	3.1	Explain the importance of effective communication with colleagues and stakeholders	<ul style="list-style-type: none"> Effective communications: how to provide colleagues and stakeholders with appropriate information, within agreed timescales and in the correct format; how to present information clearly, concisely and accurately so that others can understand and make judgements; using different communication styles to meet different needs
		3.2	Explain the importance of respecting the roles and responsibilities of different colleagues and stakeholders	<ul style="list-style-type: none"> Respecting colleagues and stakeholders: respecting the roles and responsibilities of different colleagues and stakeholders; respecting the views of others; creating a common goal; why it is important to honour commitments to colleagues and stakeholders and to advise them of anything which might prevent this; recognising protocols, language needs, diversity; showing sensitivity to internal politics which may impact on planning and coordinating the event
		3.3	Explain the importance of understanding the expectations of colleagues and stakeholders	<ul style="list-style-type: none"> Expectations of colleagues and stakeholders: the range of differing needs, motivations and expectations, e.g. financial, security, personal, material; expectations based on concerns from previous experiences Why it is important to understand these so that critical success factors for the event reflect expectations where possible, so that liaison and communication with colleagues and stakeholders is adapted to suit expectations, so that issues or concerns are resolved, so that any limiting factors, e.g. cost, time, venue capacity, access, are discussed and expectations are adjusted where appropriate
		3.4	Explain the importance of fulfilling own commitments to colleagues and stakeholders	<ul style="list-style-type: none"> Importance of fulfilling commitments to colleagues and stakeholders: to inspire trust in own leadership, to support the organisation's reputation, to build confidence in working relationships, to lead by example, to promote goodwill Consequences of not fulfilling commitments, e.g. loss of trust and cooperation, poor team performance, deadlines missed, problems unsolved

Learning outcomes		Assessment criteria		Unit amplification
		3.5	Describe situations in which conflicts of interest may occur with colleagues and stakeholders	<ul style="list-style-type: none"> Conflicts of interest: the types of conflicts of interest which may occur when planning an event, e.g. stakeholder profit targets conflicting with safety or security requirements, the need to economise on expenditure conflicting with target audience demands, personal goals or desires overriding professional advice, local community needs ignored to deliver an event, ethical or social preferences, e.g. merchandising conflicting with target profit margins, venue needs or transport requirements conflicting with environmental impact
		3.6	Explain how to resolve conflicts of interest with colleagues and stakeholders	<ul style="list-style-type: none"> Resolving conflicts of interest through negotiation, through balancing different needs, by providing reasoned arguments based on fact, by establishing a 'win-win' situation, by clarifying areas of conflict, by ensuring that those involved understand each other's points of view, by offering alternatives which will remove the conflict
		3.7	Explain the importance of consultation with colleagues and stakeholders prior to making decisions that affect them	<ul style="list-style-type: none"> Importance of consultation: how this should form an integral part of event planning; the importance of working towards 'win-win' situations so that all involved have an interest in the event succeeding; ensuring that colleagues and stakeholders are aware of and comply with legal requirements, industry regulations, organisational policies and professional codes; the repercussions of not consulting prior to making decisions that affect colleagues and stakeholders, e.g. loss of trust, loss of cooperation, forming plans based on inaccurate or incomplete information, loss of organisational reputation, adverse publicity
		3.8	Describe how to consult with colleagues and stakeholders on relevant decisions	<ul style="list-style-type: none"> How to consult with colleagues and stakeholders on relevant decisions, e.g. verbally, by letter, by email circulation, by face-to-face meetings, teleconferences, surveys; selecting and using the most appropriate methods of consultation depending on time, costs, availability, confidentiality; prioritising consultations based on legal requirements, critical success factors, aims of the event; consulting in relation to key decisions and activities taking into account views, priorities, expectations and attitudes to potential risks; identifying and dealing with disagreements

Learning outcomes		Assessment criteria		Unit amplification
4	Understand how to review working relationships with colleagues and stakeholders	4.1	Explain the importance of reviewing working relationships with colleagues and stakeholders	<ul style="list-style-type: none"> Importance of reviewing working relationships: to identify areas of success and areas needing improvement; to adjust performance targets where needed; to help to develop a supportive atmosphere between colleagues and stakeholders; to promote trust; to provide an opportunity for feedback
		4.2	Describe how to monitor and review the effectiveness of working relationships with colleagues and stakeholders	<ul style="list-style-type: none"> Monitoring and reviewing the effectiveness of working relationships: monitoring working relationships through personal observation, from feedback, through discussion and meetings, through analysing performance data; evaluating the extent to which working relationships affected or were affected by communications, decision making, consultations; considering the impact of own behaviour and actions on working relationships with colleagues and stakeholders; the importance of having clear targets for effective relationships
		4.3	Explain how to seek feedback from, and provide feedback to, relevant colleagues and stakeholders to identify areas for improvement	<ul style="list-style-type: none"> How to seek feedback from colleagues and stakeholders, e.g. directly, indirectly, personally, through others; via personal observation, using social media sites, from survey responses; providing verbal and written feedback to colleagues and stakeholders via one-to-one interviews and meetings, by open forums, by letter, by commendations; the importance of ensuring feedback is constructive; how to give effective feedback, e.g. being specific, performance or action related, choosing a suitable time and venue
		4.4	Describe the types of wider developments that may occur which might be of potential interest or concern to stakeholders in the future	<ul style="list-style-type: none"> Types of wider developments include issues which may be of interest or concern to stakeholders now or in the future, e.g. new licensing requirements, new building or transport proposals, structural changes to venues, changing legislation or industry requirements which will restrict event size, location, times, level of support services, security clearances, use of volunteers at events

Information for tutors

Delivery

This unit is integral to units on planning and implementing events.

This unit should be delivered in a way that develops knowledge and understanding of effective working relationships and their value in planning and coordinating events.

Learners need to know and understand:

- the importance of establishing and maintaining effective working relationships with colleagues and stakeholders
- how to ensure communications are appropriate and effective
- how to identify and present information accurately, concisely and effectively
- the processes and protocols that affect the way different organisations and stakeholders work together
- the interests and concerns that motivate colleagues and stakeholders
- the importance of consultation
- how to deal with conflicts of interest
- the various legal and other requirements that must be complied with
- how to evaluate working relationships to make improvements where needed

Learners should be encouraged to consider and summarise the work of event organisers of both large and small scale. They could be asked to consider two contrasting types of event and to identify the different stakeholders who would be involved in the events, for example local community groups, event sponsors, performers, contractors and sub-contractors. A further list could then be developed of potential colleagues with whom the event organiser would work, such as security professionals, local authority officers, emergency services officers. How might the influence of stakeholders change depending on the type or scale of event? What type of consultations might be needed for the different events? Learners should be asked to consider the possible concerns, such as noise, environmental damage, social disturbance etc, of different stakeholders to one or both events – this could be via role play with learners taking on the roles of the stakeholders and the event organisers.

Learners could explore the range of working relationships that would need to be in place for the events by developing a mind map, showing the interrelationships between colleagues and stakeholders. The mind map should include communication methods used between the range of personnel with any restrictions that might apply.

Knowledge of working relationships in event management, gained through active involvement rather than through a purely theoretical context, is key. Wherever possible, learners should have the opportunity to work with event management professionals or those involved in events so that they can experience the different aspects and how working relationships contribute to the overall operation of the event. This may be through working on a voluntary basis at an event.

Assessment

Learners must meet all assessment criteria to pass the unit.

Assessment should be planned to ensure efficient and effective gathering of evidence, through holistic tasks and activities. These should enable learners to produce valid, sufficient and reliable evidence that relates directly to the assessment criteria. Centres are encouraged to emphasise the practical application of knowledge and understanding in a work-related setting.

Evidence for this unit may include product evidence, for example records/minutes of event briefings, emails to suppliers, contractors, officials etc, relating to an event. If learners are in an employment situation or on a work placement, it should be possible to observe them undertaking event debriefings, thereby gaining direct evidence of their ability to manage working relationships, and of dealing with interests and problems.

Witness testimony from colleagues, suppliers, contractors, officials, managers and customers/visitors could be obtained verbally to provide evidence of the quality of interpersonal skills and the ability to establish and maintain effective working relationships.

Additional evidence of knowledge and understanding may be gathered through professional discussion with learners. They should be encouraged to bring evidence of their performance to the discussion, so that this may be referred to as validation.

Simulations, including role play, for example running an event-planning session, briefing an event team, or debriefing after an incident or issue at an event, should be as realistic as possible and should be discussed with the Standards Verifier to ensure that these are valid, fair and reliable as a source of evidence. Observation of this activity should be used as evidence.

Suggested resources

Textbooks

- Bowdin G, Allen J, O'Toole W, Harris R, McDonnell I – *Events Management* (Routledge, 3rd edition, 2011) ISBN 978-1-85617-818-1
- Brounstein M – *Communicating Effectively for Dummies* (J. Wiley & Sons, 2001) ISBN 978-0-76455-319-6
- Capell L – *Event Management for Dummies* (J. Wiley & Sons, 2013) ISBN 978-1-11859-112-3
- Gaur S – *Event Marketing and Management* (Vikas Publishing House, 2009) ISBN 978-8-12591-449-5
- Goldblatt J – *Special Events: Best Practices in Modern Event Management* (Van Nostrand Reinhold, 2nd edition, 1997) ISBN 0-442-02207-7
- O'Hara B, Beard M – *Music Event and Festival Management* (Wise Publications, 2006) ISBN 978-1-92102-973-8
- Shone A, Parry B – *Successful Event Management* (Cengage Learning EMEA, 2004) ISBN 978-1-84480-076-6
- Van der Wagen L – *Human Resource Management for Events: Managing the Event Workforce* (Butterworth-Heinemann, 2006) ISBN 978-0-75066-998-6
- Watt D – *Event Management in Leisure and Tourism* (Addison Wesley Longman Ltd, 1998) ISBN 0-582-35706-3

Journals and/or magazines

- Event Organiser* (The Event Services Association)
- International Journal of Contemporary Hospitality Management* (Emerald Group Publishing Ltd)
- International Journal of Event and Festival Management* (Emerald Group Publishing Ltd)
- International Journal of Event Management Research* (Emerald Group Publishing Ltd)
- International Journal of Hospitality and Event Management* (Emerald Group Publishing Ltd)
- Journal of Hospitality, Leisure, Sport and Tourism Education* (Elsevier)

Websites

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| www.businessballs.com/teambriefing.htm | Free ethical learning and development resources |
| www.mindtools.com/pages/article/good-relationships.htm | Building good work relationships |
| www.smallbusiness.chron.com/establish-maintain-good-relationships-workplace-22396.html | How to establish and maintain good relationships in the workplace |

13 Further information and useful publications

To get in touch with us visit our 'Contact us' pages:

- Edexcel, BTEC and Pearson Work Based Learning contact details: qualifications.pearson.com/en/support/contact-us.html
- books, software and online resources for UK schools and colleges: www.pearsonschoolsandfecolleges.co.uk

Key publications:

- *Adjustments for candidates with disabilities and learning difficulties, Access and Arrangements and Reasonable Adjustments, General and Vocational qualifications* (Joint Council for Qualifications (JCQ))
- *Supplementary guidance for reasonable adjustments and special consideration in vocational internally assessed units* (Pearson)
- *General and Vocational qualifications, Suspected Malpractice in Examination and Assessments: Policies and Procedures* (JCQ)
- *Equality Policy* (Pearson)
- *Recognition of Prior Learning Policy and Process* (Pearson)
- *UK Information Manual* (Pearson)
- *BTEC UK Quality Assurance Centre Handbook*

All of these publications are available on our website.

Publications on the quality assurance of BTEC qualifications are also available on our website.

Our publications catalogue lists all the material available to support our qualifications. To access the catalogue and order publications, please visit our website.

Additional resources

If you need further learning and teaching materials to support planning and delivery for your learners, there is a wide range of BTEC resources available.

Any publisher can seek endorsement for their resources and, if they are successful, we will list their BTEC resources on our website.

14 Professional development and training

Pearson supports UK and international customers with training related to BTEC qualifications. This support is available through a choice of training options offered on our website.

The support we offer focuses on a range of issues, such as:

- planning for the delivery of a new programme
- planning for assessment and grading
- developing effective assignments
- building your team and teamwork skills
- developing learner-centred learning and teaching approaches
- building in effective and efficient quality assurance systems.

The national programme of training we offer is on our website. You can request centre-based training through the website or you can contact one of our advisers in the Training from Pearson UK team via Customer Services to discuss your training needs.

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Training and networks: our training programme ranges from free introductory events through sector-specific opportunities to detailed training on all aspects of delivery, assignments and assessment. We also host some regional network events to allow you to share your experiences, ideas and best practice with other BTEC colleagues in your region.

Regional support: our team of Curriculum Development Managers and Curriculum Support Consultants, based around the country, are responsible for providing advice and support in centres. They can help you with planning and curriculum developments.

To get in touch with our dedicated support teams please visit our website.

Your Pearson BTEC support team

Whether you want to talk to a sector specialist, browse online or submit your query for an individual response, there's someone in our Pearson support team to help you whenever – and however – you need:

- **Subject Advisors:** find out more about our subject advisor team – immediate, reliable support from a fellow subject expert
- **Ask the Expert:** submit your question online to our Ask the Expert online service and we will make sure your query is handled by a subject specialist.

Please visit our website at qualifications.pearson.com/en/support/contact-us.html

Annexe A

Mapping with National Occupational Standards

The grid below maps the knowledge covered in the Pearson BTEC Level 3 Certificate in the Principles of Event Management against the underpinning knowledge of the National Occupational Standards in Event Management and Temporary Structures. Centres can use this mapping when planning holistic delivery and assessment activities.

KEY

indicates partial coverage of knowledge in the NOS unit

A blank space indicates no coverage of the knowledge

Pearson BTEC Specialist units National Occupational Standards		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8
		Unit 1	Unit 2	Unit 3	Unit 4	Unit 5	Unit 6	Unit 7	Unit 8
PPLEMTSA6	Identify, negotiate and secure a venue for an event	#	#	#					
PPLEMTSD3	Develop detailed plans for an event			#					
PPLEMTSD5	Manage contracts for an event								#
PPLEMTD8	Oversee health, safety and security at event sites				#				
PPLEMTSD9	Manage the setup and breakdown of an event					#			
PPLEMTSD10	Manage the running of an event						#		
PPLEMTSD12	Evaluate and report on the success of an event							#	

August 2017

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