



CANADIAN TOURISM
HUMAN RESOURCE
COUNCIL

CONSEIL CANADIEN DES
RESSOURCES HUMAINES
EN TOURISME

EVENT MANAGEMENT

International Competency Standards

NOT FOR GENERAL DISTRIBUTION

FINAL DRAFT

ABOUT THE CANADIAN TOURISM HUMAN RESOURCE COUNCIL

The Canadian Tourism Human Resource Council (CTHRC) is one of 33 national sector councils whose overall goal is to improve the quality of the Canadian labour force, and to assist businesses to be more flexible in meeting changing competitive demands. Regarded as an exemplary council by [Human Resources and Skills Development Canada](#) (HRSDC), the CTHRC conducts research, manages development projects and undertakes collaborative activities to increase labour and learner mobility. This includes skills development, labour market research, newcomer integration, recognition of foreign qualifications and credentials, and a comprehensive suite of National Occupational Standards, training and certification resources marketed under the [emerit](#) Tourism Training brand.

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emerit INTERNATIONAL COMPETENCY STANDARDS **SETTING INTERNATIONAL BENCHMARKS**

The International Competency Standards have been developed in cooperation with industry participants from 20 countries. The Standards contain a comprehensive summary of the functions, tasks and competencies required to work in event management. They describe in detail the skills, knowledge and attitudes that employers and clients are looking for when obtaining professional services to plan, implement and evaluate different types of events in Canada and internationally.

Internationally in this sense means relevant and applicable to industry practice in more than one country. This includes events of any scope (local, regional, national or international).

International Competency Standards for Event Management

Edition 1.0

These Standards are voluntary. They have been produced to benefit the events industry in general. The Standards can be used in a variety of ways by those who manage different types of events—employers, owners, trainers, labour associations, governments and local authorities.



emerit is a brand of the Canadian Tourism Human Resource Council.

For more information visit www.emerit.ca or contact info@emerit.ca.

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EVENT MANAGEMENT—A GROWING INDUSTRY

Events of different types, sizes and complexity are held for numerous reasons, including to market, enhance culture, build business relationships, raise funds, develop society, celebrate, and entertain, among others. Events can have a large impact on their communities or countries. Event managers are now expected to apply project management principles, manage more complex safety and risk variables, and integrate concepts such as sustainability.

As demand for professional Event Management services continues to grow, planning and delivery of these services must also be professionally managed.

TYPES OF EVENTS INCLUDE:

- *conventions*
- *corporate marketing events*
- *cultural events*
- *exhibitions*
- *fairs*
- *festivals*
- *meetings*
- *political events*
- *special events*
- *sports events*
- *trade shows*

Defining competency standards is one way to help increase understanding of the broad range of competencies required of those who have responsibility and carry the risk for successfully managing different types of events.

Event Management is transforming into an established and recognized profession. But inconsistent terminology persists and typologies of events remain works in progress. In these Standards, the term “**event**” represents all types of events, and applies to any event discipline. **These Standards represent the most comprehensive competency-based body of knowledge**

that applies to all disciplines in the field of Event Management compiled to support this growing industry.

AN “EVENT” IS DEFINED AS:

a gathering of any size that is held:

- *at a particular time*
- *in a particular place*
- *for a particular purpose*
- *one time or recurring*
- *publicly or privately*
- *in an urban or rural setting*
- *indoors or outdoors*
- *at one or more locations*

Event Management and the Tourism Sector

Much of what the events industry contributes to national economies should fall under the umbrella of the tourism sector. But because the goods, services, and expertise associated with meetings and events come from numerous industries, measuring and defining the events industry’s economic contribution is more difficult than it is for other industries.

After decades of work, the tourism sector developed and finalized the Tourism Satellite Account (TSA), which precisely defines all tourism-related activity that takes place within the economy as a whole. Although meetings, conventions and trade shows make important contributions to the tourism sector, the value attributed to the events industry is often not included in measurements. It may be beneficial for the events industry to adopt an approach similar to the TSA to address these measurement challenges

STANDARDS OVERVIEW

Comprehensive and Inclusive

These Standards provide a comprehensive summary of competencies—knowledge, skills and attitudes—required when **managing any type of event anywhere in the world.**

They contain competencies that are relevant to those who are responsible for managing all aspects of an event, including:

- planning;
- implementation; and
- evaluation.

This includes managing a team and/or overseeing the outsourcing of activities to third-party service providers.

No single definition exists for those who manage different types of events. Job incumbents are often referred to as coordinator, manager, producer, designer or director. They may be working in a variety of job settings—in formal employment, contractual relationships, or carrying out tasks as volunteers. Many perform these tasks on a regular basis, while others may be involved with events temporarily, once or twice a year. Often, practitioners manage more than one type of event.

The Standards cover the competencies required by industry that job incumbents must master in a range of situations.

Developed by Industry for Industry

In 2008, the Canadian Tourism Human Resource Council (CTHRC) initiated a project to develop these Standards in collaboration with an international stakeholder group. Key phases of development included:

- **Research and analysis** of documentation related to event management from participating jurisdictions, including DACUM charts, program outlines, curricula, certification program details, evaluation blueprints, research papers and websites. **Benchmarking** including valuation with foreign national qualifications and occupational standards.
- **Creation and validation of the competency framework or DACUM through virtual consultations.**
- **Development and validation of performance and knowledge descriptors through virtual and face-to-face consultations.**
- **Quantitative research to determine relevance, frequency and criticality ratings.**

HOW ARE STANDARDS USED?

The International Competency Standards for Event Management provide the events industry with a comprehensive body of knowledge. Such a repository of performance and knowledge standards is essential to clearly outline what is required for success in this diverse industry. Specific groups that can benefit from standards include practitioners, educators, managers, owners, employers, governments and local authorities.

Do you **MANAGE** different types of **EVENTS**?

Use the Standards as a guide to:

- learn more about the events industry
- recognize the skills you have to offer to employers and clients
- plan, implement and evaluate events
- enhance your performance
- increase your job mobility across event disciplines and countries
- plan your professional development
- plot your career path

(Your particular job context and your level of responsibility will determine if all or only selected competencies apply to you.)

Are you an **EMPLOYER**? Do you **MANAGE TEAMS**?

Use the Standards to:

- define job requirements
- write job advertisements
- create job descriptions
- provide orientation to new employees
- assess potential employees
- manage performance
- conduct performance assessments
- identify workforce needs
- plan learning and development activities

Are you a **TRAINER, CURRICULUM DEVELOPER, or PROGRAM MANAGER**?

Use the Standards to:

- benchmark existing training programs
- develop new training programs
- create new vocational qualifications
- explore areas for research in event management

Do you **PURCHASE EVENT SERVICES** or are you representing **GOVERNMENT** or a **LOCAL AUTHORITY**?

Use the Standards to:

- construct requests for proposals
- assess proposals
- inform policy or regulations

INCREASING RECOGNITION OF SKILLS

Supporting Mobility Across Event Disciplines and Countries

Designated organizations have developed industry-based standards to train and assess event management practitioners for particular countries.

International professional associations have developed focused training and industry certifications to support their members' training and development needs. These programs usually specialize in the management of a particular type of event, such as special events, international festivals, meetings, and conventions.

These International Competency Standards for Event Management combine the best of both worlds. They describe the competencies required to plan, manage and evaluate any type of event anywhere in the world.

These Standards provide a common reference point or benchmark that enables recognition of prior learning for event practitioners who specialize in certain disciplines. The Canadian Tourism Human Resource Council encourages credential-granting bodies to engage in mutual recognition activities to determine equivalencies and implement reciprocity agreements to increase credit for learning for the benefit of job incumbents, learners and the industry.

Professional Certification

Professional certification based on the International Competency Standards for Event Management is available. To become certified, industry professionals are required to complete a series of assessments and meet the experience requirements. The certification model is voluntary and the intent of certification is to recognize competence, not to regulate or control practices.

Join the On-line Community

http://cthrc.ca/en/member_area/collaboration_portal/projects/certification_and_credentials/international_event_management_standard_and_credential_iems.aspx?mode=Join

INTERNATIONAL COMPETENCY STANDARDS FOR EVENT MANAGEMENT

BLOCK A STRATEGIC PLANNING

Task 1 Manage Strategic Plan for Event

COMMON KNOWLEDGE

❖ *not applicable*

Note: These knowledge statements apply to all Subtasks in Task 1

SUBTASKS	KNOWLEDGE AND ABILITIES
1.01 Develop mission statement, goals and objectives of event	<p>Knowledge of:</p> <ul style="list-style-type: none"> • purpose or reason for event • mission statement, goals and objectives of organization and stakeholders • target market(s) • type of geographic location and environ culture envisaged by organization • type of event envisaged by organization, e.g., spectator, participatory • sustainability issues • type of budgets that may be available • target date(s) of event • special conditions <p>Ability to:</p> <ul style="list-style-type: none"> • work with, communicate and understand stakeholder goals • develop mission statement to specify purpose, philosophy and target markets • develop goal statements to specify how event will achieve its mission • develop objectives to specify the actions, time frames and performance measurements needed to achieve goals • align mission statement, goals and objectives of event and organization/stakeholders <p>.....</p>
1.02 Determine feasibility of event	<p>Knowledge of:</p> <ul style="list-style-type: none"> • event industry, including emerging trends • research methods suitable to ascertain viability of this event • applicable legislation and regulatory requirements • sources of potential revenue • timeline constraints • societal trends <p>Ability to:</p> <ul style="list-style-type: none"> • review information about event or similar events including historical data, e.g., surveys, evaluations • attend similar events • evaluate competition • network with resource people, e.g., previous hosting committees/communities, service groups, suppliers • identify legal and regulatory requirements • conduct market research, i.e., survey(s) • determine short-, medium- and long-term economic and social impacts on hosting community • develop profile of potential attendees • analyze costs and benefits • determine complexity of event, e.g., size, duration, number of activities, service requirements and attendees • evaluate risk components • identify potential sources of revenue and other resources • identify opportunities for strategic alliances, e.g., with existing facilities and

events

- recommend to organization/stakeholders whether or not to proceed with event
 - identify potential stakeholders
-

1.03 Determine requirements to carry out the event

Knowledge of:

- event requirements, e.g., human resources, marketing, logistics/operations
- legal and regulatory restrictions
- cost/benefit analysis
- tools or resources available for event planning, e.g., software

Ability to:

- identify requirements based on scope of event, for example:
 - planning cycle
 - sponsorship opportunities
 - additional sources of resources
 - event evaluation
 - administrative needs
 - leadership and management
 - logistics and operations structure
 - marketing
 - human resources, e.g., number of people, wage rates
 - event timing, location and size
 - data flow, storage and manipulation
 - public relations
 - systems to track progress towards goals, e.g., sales to financial plan
 - research options available to meet requirements
 - evaluate costs and benefits for options available
 - select best options/strategies
 - record best options/strategies and financial information
 - obtain support and involvement of organization in strategic planning
-

1.04 Develop financial summary

Knowledge of:

- types of financial information required for a strategic plan
- tools or resources for financial planning, e.g., spreadsheets, software
- options available to meet needs and respective costs, e.g., contract and employment situations for personnel

Ability to:

- compile financial information, for example:
 - financial results
 - current financial position
 - sources and applications for funding
 - current balance sheet details, e.g., assets, liabilities, equity
 - statement of operational costs
 - cash flow statements
 - projected closing balance sheets
 - break-even analysis
 - projected return on investment
 - applicable taxes or levies
 - seek professional assistance as required, e.g., accountant, banker
-

1.05 Monitor strategic plan

Knowledge of:

- mission statement, goals and objectives of organization
- financial plan
- logistics and critical path
- inter-relatedness of all aspects of the event
- potential impact of changes on all other aspects of the event

Ability to:

- compare event progress to event mission statement, goals and objectives

- monitor cash flow statements to determine financial standing
- ensure financial resource flow from sources and applications
- analyze all data available when deciding to change course
- record change control details, e.g., date, rationale, implementation plan
- seek professional assistance as required, e.g., accountant, banker
- suggest changes or revisions to strategic plan, if needed, with organization and/or key stakeholders

BLOCK A **STRATEGIC PLANNING**
Task 2 **Develop Sustainability Plan for Event**

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 2

- ❖ concepts of sustainability, i.e., integration of economic, social and environmental considerations in event planning
- ❖ capacity planning and need for growth
- ❖ mission statement, goals and objectives of organization
- ❖ inter-relatedness of all aspects of event
- ❖ target market(s)

SUBTASKS

KNOWLEDGE AND ABILITIES

2.01

Implement sustainability management plan

Knowledge of:

- geographic location, local populations, their culture(s) and history
- local issues and concerns, e.g., social, economic, environmental
- event concept and image
- quality standards for event

Ability to:

- review evaluations and feedback from previous and/or similar events
- consider potential short- and long-term impacts of event
- determine needs for sustaining event, e.g., systems, quality control
- comply with legislation, e.g., environmental, local zoning, human rights, health and safety, labour
- select strategies to create positive outcomes and mitigate negative impacts of event, for example:
 - support initiatives for community development, e.g., infrastructure, social programs
 - hire local residents
 - purchase local and fair-trade goods and services
 - protect cultural and historical sites
- align sustainability practices with existing management structure(s), if required

2.02

Demonstrate environmental responsibility

Knowledge of:

- environmental issues and concerns of local area
- environmental capacity of community, e.g., waste management infrastructure
- current environmental technology and practices

Ability to:

- integrate environmental awareness into event management
- implement conservation practices, for example:
 - reduce energy use
 - reduce water consumption
- implement recycling programs, for example:
 - purchase recyclable products
 - set up recycling collection systems
- reduce pollution, for example:

- minimize noise and light pollution
 - control use of harmful substances, e.g., chemicals, paints
 - purchase goods and services from environmentally responsible suppliers, as appropriate
-

BLOCK B **PROJECT MANAGEMENT**
Task 3 **Plan Event Project**

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 3

- ❖ mission statement, goals and objectives of event and organization
- ❖ types of research and evaluation appropriate for all aspects of the event
- ❖ event details, e.g., features, critical path
- ❖ scope and requirements of the event, e.g., human resources, marketing, logistics/operation

SUBTASKS		KNOWLEDGE AND ABILITIES
3.01	Develop project plan	<p>Knowledge of:</p> <ul style="list-style-type: none"> • target market(s) • event planning tools, e.g., Gantt chart, software <p>Ability to:</p> <ul style="list-style-type: none"> • review historical data, e.g., previous project plan(s): <ul style="list-style-type: none"> - identify strengths and weaknesses - review goals and objectives - compare results to goals and objectives • develop objectives that will contribute to achieving goals • specify the actions, time frames and performance measurements needed to achieve objectives • identify resources available, e.g., financial, material, staff • involve relevant stakeholders in planning process <p>.....</p>
3.02	Develop quality standards, policies and procedures	<p>Knowledge of:</p> <ul style="list-style-type: none"> • event industry • standards-setting procedures • research methods <p>Ability to:</p> <ul style="list-style-type: none"> • review legal, regulatory, ethical and social requirements for the event • review existing standards, policies and procedures • develop standard contract with penalty clause and service level agreement • define areas requiring standards, policies or procedures • conduct research • obtain expert advice and information when necessary • develop draft standards, policies and procedures • obtain support of organization and key stakeholders • communicate standards, policies and procedures <p>.....</p>
3.03	Develop theme for event	<p>Knowledge of:</p> <ul style="list-style-type: none"> • research methods • range of creative, promotional, technical and operational options • key stakeholders and their processes • human social and emotional interactions at events • budget restrictions • target market(s) • marketing and public relations options

- community dynamics

Ability to:

- determine expectations through research and consultation, for example:
 - analyze previous events
 - research target market(s)
- generate ideas, e.g., brainstorm, network
- conceive an event theme that will complement or integrate with organization's marketing strategy
- design event context from a participant/spectator perspective
- engage expertise if required, e.g., marketing firm, consultant
- conceptualize theme:
 - identify core concepts, topics or messages
 - create appealing images, e.g., logo
 - identify means to integrate theme into all aspects of event
 - involve stakeholders, e.g., consider requirements of sponsors
 - consider cultural rituals associated with event
- integrate branding and theme imagery into all aspects of event experience

3.04 Develop procurement plan

Knowledge of:

- how to conduct a cost/benefit analysis
- request for proposal (RFP)/tender brief process

Ability to:

- evaluate past patterns of resource use, trends and developments
- identify need for supplementary products and services, including required range and quantity
- research options available to meet needs
- evaluate costs and benefits for options available
- select best options/strategies, e.g., purchase or rent equipment, issue a request for proposals for services
- adjust activities if products/services are not available
- record best options/strategies and financial information

3.05 Establish milestones and critical path

Knowledge of:

- tasks and phases required for event
- interdependence of tasks and phases
- schedule development and revision

Ability to:

- identify specific, realistic, measurable and achievable tasks and phases required to meet event objectives
- set goals and objectives
- prioritize goals and objectives
- determine links, dependencies, timelines and critical dates
- estimate task durations
- assign tasks to specific committees or individuals
- schedule regular review of critical path
- identify potential risks
- adjust critical path as needed

3.06 Develop integrated communication plan

Knowledge of:

- applicable legislation, e.g., freedom of information and protection of privacy
- organizational structure

Ability to:

- design event communication plan that will complement or integrate with organization's communication plan
- establish standardized documentation and document design procedures
- develop information retrieval systems
- develop information collection policies, procedures and structures

- develop information distribution policies, procedures and structures
- establish policies and procedures to maintain system security and integrity, e.g., develop privacy policy
- establish data reporting and monitoring systems
- establish record keeping and filing systems
- develop information preservation and archiving policies and procedures
- develop plan for site communication, e.g., use of two-way radios, protocols, emergency contacts, risk management plan
- source and select technology for site communication
- analyze and select different technologies, e.g., database, paper filing system

3.07 Develop evaluation/audit procedures

Knowledge of:

- evaluation processes and procedures
- generally accepted accounting principles
- setting measurable objectives
- event-related elements or activities that may be evaluated/audited before, during and after the event
- stakeholder requirements

Ability to:

- determine purpose of evaluation/audit
- identify areas to be evaluated, e.g., mission, goals, program, sponsorship program, attendance, finances
- identify critical success factors for event, i.e., benchmarks
- design evaluation/audit procedures, for example:
 - determine who will conduct evaluation/audit
 - identify information required for evaluation/audit, e.g., plans, budgets, variance reports, progress reports
- determine date(s) for implementation

BLOCK B PROJECT MANAGEMENT
Task 4 Manage Event Project

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 4

- ❖ mission statement, goals and objectives of event and organization
- ❖ organizational policies and procedures
- ❖ organizational structure

SUBTASKS

KNOWLEDGE AND ABILITIES

4.01 Manage critical path

Knowledge of:

- critical path and review schedule

Ability to:

- identify specific tasks and projects required to achieve mission, goals and objectives of event
- prioritize tasks and projects
- determine timelines and critical dates
- create event briefs outlining relevant information for specific stakeholders, e.g., committee members, suppliers, agencies
- assign tasks to specific committees or individuals based on skills or areas of expertise
- schedule regular review of critical path:
 - analyze variations between estimated and actual time
 - analyze resource shortfalls and overages
- take corrective action based on results of review
- adjust critical path as needed

- keep key personnel informed of progress and changes

4.02 Manage contracts

Knowledge of:

- principles of negotiation, stages of negotiating process and different negotiation techniques
- components of legal contracts
- event requirements

Ability to:

- identify requirements for contract:
 - prepare specifications
- promote request for proposal/tender brief process to potential suppliers of goods and services
- evaluate tenders against criteria
- make a selection
- negotiate contracts:
 - strive for beneficial outcomes for all parties involved
 - determine what is negotiable and non-negotiable
 - explain own position and viewpoint
 - listen to and validate other parties' positions and viewpoints
 - discuss options
 - agree on most viable options, e.g., service, timelines
 - agree on sources of information for evaluation
- integrate contractual obligations into event's critical path
- maintain productive relationship with contractors:
 - monitor progress on a regular basis to ensure own organization and contractors are fulfilling obligations
 - monitor budget to identify variances
 - agree on action to rectify non-compliance
 - deal with breaches of contract within acceptable time frame
- evaluate contractors' performance to identify strengths and weaknesses

4.03 Manage running of the event

Knowledge of:

- critical path and review schedule
- on-site resources, personnel and supports
- on-site event management

Ability to:

- follow agreed-upon plans for event
- maintain flow/sequence of activities during event
- ensure all resources, personnel and supports are in place and ready
- ensure all personnel and participants are briefed
- provide authorizations for stages of event to take place
- oversee the work of key personnel and other stakeholders throughout event:
 - follow integrated communications plan
- implement risk management techniques and strategies to minimize disruption to participants and attendees and to deal with problems that arise
- keep key personnel informed of progress and changes
- maintain records during event

4.04 Evaluate/audit event

Knowledge of:

- information management plan, e.g., available sources of information
- integrated communication plan, e.g., privacy of information
- extent of responsibility for evaluation
- information analysis processes
- methods and principles of evaluation
- generally accepted accounting principles
- sources of information, e.g., plans, budget, variance reports, progress reports

Ability to:

- review critical success factors for event, i.e., benchmarks

- implement evaluation/audit procedures as scheduled, for example:
 - collect and analyze information
 - verify validity and reliability of information
 - identify and report any difficulties accessing information
 - identify and address irregularities
- evaluate information, e.g., identify reasons for success/failure and key lessons for future events
- develop report:
 - detail information used and information sources
 - explain how information has been analyzed
 - draw conclusions and make recommendations based on evidence
 - use best format for organization, key personnel and stakeholders
- follow integrated communication plan for distribution of evaluation/audit report and confidentiality guidelines

BLOCK C RISK MANAGEMENT
 Task 5 **Manage Risk Management Plan**

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 5

- ❖ mission statement, goals and objectives of event and organization
- ❖ event plans, e.g., critical path
- ❖ common risk factors
- ❖ common risk management procedures

SUBTASKS	KNOWLEDGE AND ABILITIES
5.01 Identify risks	<p>Knowledge of:</p> <ul style="list-style-type: none"> • research methods • importance of risk management • organizational capabilities <p>Ability to:</p> <ul style="list-style-type: none"> • review the event plan, e.g., type of event, location of event, time of year, time of day, duration of event, profile of attendees, number of attendees • facilitate risk assessment meeting • review any investigations of previous incidents • determine scope and nature of legal and regulatory obligations: <ul style="list-style-type: none"> - consider the range of legal and regulatory issues, e.g., contracts - determine jurisdictions responsible, e.g., national and local governments - identify legislation, codes, ordinances, mandates and regulations applicable to the event and its operations - identify authorities, agencies or governing bodies responsible - determine process for acquiring authorizations • consult with other relevant individuals, e.g., colleagues, clients, contractors, performers • inspect venue for potential hazards, threats, vulnerabilities or other risks • determine the need for specialist advice or assistance in addressing legal, regulatory and jurisdictional requirements • consult with regulatory authorities to determine need for specifications and procedures for event • produce risk profile
5.02 Analyze risks	<p>Knowledge of:</p> <ul style="list-style-type: none"> • authorities, agencies and governing bodies that preside over specific activities within a jurisdiction <p>Ability to:</p>

- determine:
 - what is exposed to damage, loss or liability, e.g., property, persons, cash, reputation, environment
 - what could cause damage, loss or liability
 - who would suffer damage, loss or liability
 - when damage, loss or liability might occur
 - assess:
 - probability of occurrence
 - severity of consequences, e.g., extent of impact, financial consequences, maximum possible loss or liability
 - prioritize risks, considering:
 - organization's tolerance for risk
 - jurisdiction's mandates regarding risk
 - consider effectiveness of risk management techniques, for example:
 - loss prevention, e.g., security, incorporation, copyright
 - risk financing, e.g., insurance, hold backs, payments, liens
 - risk control, e.g., safety precautions, safety training, maintenance programs
 - contingency planning
-

5.03 Select risk management techniques and strategies

Knowledge of:

- authorities, agencies and governing bodies that preside over specific activities within a jurisdiction
- risk analysis

Ability to:

- consider risk management options, for example:
 - loss prevention, e.g., security, incorporation, copyright
 - risk financing, e.g., insurance, hold backs, payments, liens
 - risk control, e.g., safety precautions, safety training, maintenance programs
 - evaluate options to meet legal requirements and mitigate risks:
 - seek advice from regulatory authorities and specialists
 - remove hazards that can be eliminated
 - put supports in place to minimize risks
 - establish risk management policies and procedures:
 - seek input from regulatory authorities and specialists, e.g., underwriters
 - prepare risk management plan, including:
 - chain of command
 - emergency and control procedures
 - spokesperson
 - obtain support of organization and key personnel for risk management techniques and strategies
 - implement plan to manage risks
 - communicate plan and procedures, e.g., to emergency services, media, senior management and staff
 - evaluate risk management plan on ongoing basis
-

5.04 Develop contingency plans

Knowledge of:

- organizational structure
- risk analysis

Ability to:

- identify circumstances that may require contingency plans, e.g., weather, cancellations, labour disputes, funding shortfalls
- develop alternatives in the event of specific circumstances:
 - consult with key personnel to identify options
 - consider human, fiscal and material factors of options
- outline implementation strategies, e.g., decision-making authority, methodology, resource requirements, coordination requirements
- develop internal and external communication strategies
- obtain support of key event and community personnel for contingency plans

- 5.05 Monitor risk management plan
- Knowledge of:
- risk management plan
 - risk management strategies and techniques
 - applicable legislation, e.g., fire, liability, public health, environmental protection
- Ability to:
- collect and evaluate information on how risks are being dealt with
 - identify frequency of contingency plan use
 - monitor use of resources allocated to risk management:
 - ensure sufficient resources are available
 - identify areas for improvement
 - inform key personnel of effectiveness or shortfalls of techniques and strategies and identify necessary action to be taken
 - make changes to risk management plan as needed

BLOCK C **RISK MANAGEMENT**
Task 6 **Manage Risks**

<p>COMMON KNOWLEDGE</p> <p><i>Note: These knowledge statements apply to all Subtasks in Task 6</i></p>	<ul style="list-style-type: none"> ❖ mission statement, goals and objectives of event and organization ❖ event plans, e.g., critical path ❖ applicable legislation, e.g., fire, public health and safety
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SUBTASKS	KNOWLEDGE AND ABILITIES
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|--|---|
| <p>6.01 Comply with legal and regulatory obligations</p> | <p>Knowledge of:</p> <ul style="list-style-type: none"> • research methods <p>Ability to:</p> <ul style="list-style-type: none"> • analyze event plan to determine legal and regulatory obligations • conduct research to determine legal requirements and authorizations needed: <ul style="list-style-type: none"> - consider issues/activities involved - determine jurisdictions, e.g., local, national • seek advice or assistance in addressing legal, regulatory and jurisdictional requirements • identify legislation, codes, ordinances, mandates and regulations applicable to the event and its operations • identify and meet requirements, for example: <ul style="list-style-type: none"> - acquire permits - accommodate inspections - develop specifications and procedures, e.g., entry criterion, waivers, consent forms, releases, rules for participation • develop policies and procedures that meet or exceed legal and regulatory requirements • implement policies and procedures • monitor event activities and staff activities to ensure compliance • correct any failures to meet legal and regulatory obligations • adjust policies and procedures to reduce non-compliance • keep organization and key stakeholders advised of any failures |
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|--------------------------------|---|
| <p>6.02 Manage emergencies</p> | <p>Knowledge of:</p> <ul style="list-style-type: none"> • emergency public relations and communications plans <p>Ability to:</p> |
|--------------------------------|---|

- conduct a threat assessment to identify potential threats, hazards or emergencies, e.g., earthquake, disease outbreak, hazardous material spill, utility failure, bomb threat, structure collapse
- conduct a capability assessment to determine the resources available to respond to an emergency, e.g., medical, fire, rescue, security
- liaise with authorities to determine requirements and appropriate procedures for emergencies, for example:
 - access, egress and locations for emergency services
 - exit route configuration for site evacuation
 - on-site medical services required, e.g., number and locations of first-aid stations and emergency medical technicians
 - internal and external communication systems
 - roles, responsibilities, lines of authority and delegation of duties
- develop emergency action plans and communication procedures
- develop contingency and business continuity plans as appropriate

6.03 Comply with health and safety requirements

Ability to:

- identify health and safety requirements, for example:
 - ensure venue and site meet fire/life safety codes
 - develop and enforce policies that require vendors, exhibitors and participants to comply with fire/life safety codes
 - determine Occupational Health & Safety (OH&S) requirements for event workers and work environment
 - conduct hazard assessments
- determine requirements
- research options available to meet requirements
- evaluate options
- select best options/strategies
- review effectiveness of options/strategies periodically

6.04 Acquire insurance

Knowledge of:

- risk analysis

Ability to:

- identify types of insurance coverage needed or recommended
- research coverage available, including:
 - liability
 - terms and conditions
 - exclusions
 - rates
- select best option
- review insurance coverage needs and levels periodically
- update insurance coverage as needed

6.05 Arrange security

Knowledge of:

- risk analysis

Ability to:

- determine needs, considering:
 - type of event
 - hours of operation
 - type of venue
 - types of activities, e.g., serving alcohol
 - number and nature of attendees and VIPs
 - number and nature of entrances and exits
 - traffic patterns
 - insurance requirements
- comply with legislation
- inform authorities—e.g., fire, police—of event time, dates and activities
- arrange for:

- security staff and facilities
 - training for staff and volunteers
 - accreditation for security staff
 - detail security procedures for emergency situations, for example:
 - crowd control
 - site evacuation
 - natural disaster
 - terrorist activities
 - implement internal and external security communication systems
 - establish system for reporting and recording incidents
-

BLOCK D FINANCIAL MANAGEMENT
Task 7 Develop Financial Resources

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 7

- ❖ mission statement, goals and objectives of event and organization
- ❖ applicable legislation and legally binding documents, e.g., contracts
- ❖ event profile, features, budget and decision deadline
- ❖ event plans, e.g., critical path
- ❖ target markets

SUBTASKS

KNOWLEDGE AND ABILITIES

7.01

Manage sponsorship process

Knowledge of:

- sponsorship goals/targets including on-site and post-event media deliverables
- sponsorship protocols, e.g., preferred method of communication

Ability to:

- establish sponsorship levels:
 - set financial or in-kind values for each level
 - identify benefits for each level
 - estimate costs for providing benefits
- obtain support of key stakeholders for proposed sponsorship arrangements
- identify potential sponsors, considering:
 - compatibility with event
 - exclusivity
 - income or cost-avoidance goals
 - advertising and budget limitations
- produce sponsor benefit packages containing:
 - overview and history of event
 - corporate identity to be presented, e.g., use of logos
 - value for sponsorship
 - letter of proposal
 - audience demographics
- distribute sponsor benefit packages to potential sponsors
- contact potential sponsors, e.g., primary decision-maker or person of influence:
 - determine type of support available, e.g., cash, discounts, products
 - consider how sponsors may complement or conflict with each other
 - establish relationship with sponsors' creative agencies
 - negotiate sponsor commitment, e.g., distribution, product sales, set-up, tear-down
- prepare contracts for committed sponsors, outlining:
 - details of event
 - responsibilities of both parties, e.g., liabilities, personnel, entertainment
 - financial obligations
 - release forms and waivers
 - policy regarding event cancellation

- ensure both parties have copies of signed contract
- maintain relationships with sponsors:
 - provide regular updates
 - send letters of thanks
 - ensure sponsors are invited to event
- ensure contractual fulfillment, e.g., delivery of benefits
- follow up, e.g., evaluate sponsor involvement, return on investment from their point of view

7.02 Manage donor process

Knowledge of:

- financial targets for donors

Ability to:

- identify potential donors
- determine need for donor recognition
- develop donor recognition program, e.g., benefactor, friend, supporter
- coordinate approach for soliciting potential donors
- contact potential donors:
 - outline how donations will be used
 - request specific contribution if appropriate
- prepare contract stating expectations of both parties
- implement donor recognition program

7.03 Manage program funding process

Knowledge of:

- financial targets for funding

Ability to:

- review budget and set goals for funding
- research potential funders, e.g., government, foundations, associations:
 - identify available funding, e.g., grants
 - determine eligibility for funding
 - identify contact persons
- obtain and complete applications
- compile support materials, for example:
 - letters of recommendation
 - budgets/financial statements
 - business plans
 - benefits
- submit applications and support materials to appropriate parties
- follow up on status of application, e.g., by telephone, send letter
- meet requirements of funding that is awarded, e.g., reporting

BLOCK D FINANCIAL MANAGEMENT
Task 8 Manage Budget

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 8

- ❖ mission statement, goals and objectives of event and organization
- ❖ financial goals
- ❖ financial statements and management systems

SUBTASKS

KNOWLEDGE AND ABILITIES

8.01 Develop budget

Ability to:

- seek professional assistance, e.g., banker, accountant
- establish budget format and categories
- identify, access and interpret data and data sources needed for budget

- preparation, e.g., previous budgets, audits
- analyze internal and external factors for potential impacts on budget, e.g., new legislation, market trends
- determine potential sources of revenue, for example:
 - grants
 - sponsorship
 - sales, e.g., ticket sales, souvenirs
- allocate budget amounts for event activities, for example:
 - programming
 - production
 - marketing
 - administration
 - human resources
- establish contingency plan and funds
- develop chart of accounts:
 - break down into weekly or monthly budgets
 - detail projected cash flow
- determine fixed and variable costs
- establish budget control guidelines, e.g., payment policies and procedures, cost controls
- schedule regular budget reviews
- submit budget for approval, if necessary, e.g., to investors, bank, partners or organization:
 - revise budget as required
- communicate budget decisions to those affected

8.02 Establish pricing

Knowledge of:

- profit requirements
- cost of sales
- attendee income profiles
- annual consumer price index trends
- currency and credit card procedures for multi-national events

Ability to:

- collect and analyze information related to current market conditions
- calculate direct and indirect costs
- establish pricing structure, e.g., percentage increase or cost plus

8.03 Establish financial controls and procedures

Knowledge of:

- cash flow requirements, e.g., human resources, marketing, inventory, logistics/operations

Ability to:

- schedule regular budget reviews to:
 - compare actual to projected costs and revenues
 - analyze variances
 - identify revisions needed
- make arrangements for credit, e.g., credit accounts with suppliers
- establish systems and controls, for example:
 - two signatures on cheques
 - purchase orders
 - change orders
 - inventory control and tracking systems
- monitor systems and controls, for example:
 - establish internal and external audit procedures
 - produce month-end reports and cash flow reports
 - check bank reconciliations

8.04 Manage cash flow

Knowledge of:

- accounting procedures

- Ability to:
- review accounting procedures regularly:
 - examine receivables, payables, inventory and cash flow
 - review financial statements monthly for accuracy
 - review cash management procedures for effectiveness and security
 - inform key personnel immediately if fraudulent activities are identified
-

8.05 Monitor budget performance

- Knowledge of:
- budget control guidelines
 - importance of budget control
 - reporting mechanisms and audit procedures

- Ability to:
- adhere to budget control guidelines and respond to variances
 - monitor revenues and expenses within established time frames:
 - review bank reconciliations, expenses and variance history
 - compare budgeted amounts to actual amounts
 - identify variances between budgeted and actual figures:
 - determine cause(s)
 - respond accordingly, e.g., revise activities, reallocate funds
 - communicate information and decisions to those affected
 - identify opportunities for improved budget performance:
 - proactively source new suppliers and revenue streams
 - discuss desired budgetary outcomes with colleagues
 - present recommendations to appropriate individual or department
 - pursue ideas for increasing income or reducing expenditures
 - communicate budget performance to key personnel
 - complete financial and statistical reports
-

8.06 Revise budget

- Knowledge of:
- budget development/revision guidelines
 - limits of authority
 - communication requirements

- Ability to:
- revise or propose revisions to budget, e.g., reallocate funds to cover unexpected expenditures or revenues
 - seek approval as required
-

BLOCK D FINANCIAL MANAGEMENT
Task 9 Manage Cash Handling

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 9

- ❖ financial policies and procedures
- ❖ security measures

SUBTASKS

KNOWLEDGE AND ABILITIES

9.01 Establish cash handling procedures

- Ability to:
- communicate policies and procedures to staff and volunteers
 - take steps to prevent theft
 - coordinate money handling:
 - set up central cash office
 - establish record keeping systems
 - set up cash collection and deposit systems

- arrange for security and audit systems

- 9.02 Monitor cash handling procedures
- Ability to:
- review security procedures
 - monitor revenues and expenses
 - monitor cash handling procedures
 - monitor audit documentation
 - revise procedures as needed

BLOCK E ADMINISTRATION
Task 10 Perform Administrative Tasks

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 10

- ❖ basic technology terminology
- ❖ applicable legislation, e.g., freedom of information and protection of privacy
- ❖ organizational policies and procedures

SUBTASKS

KNOWLEDGE AND ABILITIES

- 10.01 Coordinate office administration

Knowledge of:

- operating and maintenance guidelines for office equipment
- workplace ergonomics
- troubleshooting procedures for technology and equipment
- software licenses and usage requirements
- systems analysis for setting up data flow and capture

Ability to:

- standardize administration functions, e.g., systems, policies and procedures for record-keeping, selecting/purchasing supplies and equipment, maintaining equipment
- monitor administrative functions to ensure they are being completed as required
- ensure routine maintenance is carried out and/or arranged
- organize workspace, furniture and equipment according to ergonomic requirements for long periods of desk work
- evaluate office functions and make adjustments
- administer payroll and benefits programs
- monitor cash control procedures
- monitor accounts receivable and payable procedures
- review calendar of office operations, e.g., timing of quarterly tax remittances
- troubleshoot problems related to technology and equipment

- 10.02 Manage information system

Knowledge of:

- budget allocation for information system
- types of information to be managed
- information interface, e.g., human to non-human (how it will happen)
- audit trail, e.g., paper, electronic
- storage and retrieval requirements
- security requirements
- filing systems and protocols for electronic and paper files
- storage options, e.g., in-house, off-site

Ability to:

- identify information to be managed and resources available
- design system that meets needs and budget, e.g., set up integrated filing system for electronic and other files
- provide training to users

- monitor use of information system
- review and adjust information systems to better meet needs
- review records storage system:
 - keep records accurate and current, e.g., delete outdated records
- maintain security of information system, e.g., require passwords for access to records, secure essential records off-site
- follow procedures for back-up of electronic files
- resolve problems

10.03 Write reports

Knowledge of:

- organizational reporting requirements using text-based documents e.g., reports, research, deadlines
- audience
- research techniques and methods
- relevant sources of information
- report formats, structures and styles for commonly used business documents
- effect of formatting on readability and appearance of documents
- options for presentation, e.g., design, layout
- options for security, e.g., read only
- capabilities and limitations of computer software programs, e.g., where to access manuals, user documentation and online help

Ability to:

- use computer hardware and software, e.g., word processing software, spreadsheet software
- research information using formal and informal methods
- organize information to assist analysis
- analyze and assess data for relevance
- identify key ideas to develop a clear message
- determine document purpose, audience and presentation requirements with appropriate personnel
- design structure and layout, considering needs of audience
- use language and style appropriate to audience
- input text and data into format
- edit and proofread
- obtain feedback and approvals, as necessary
- follow information management system protocols, e.g., follow file name format, create back-up file

BLOCK F HUMAN RESOURCES

Task 11 Manage Human Resources Plan

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 11

- ❖ mission statement, goals and objectives of event and organization
- ❖ job descriptions
- ❖ current and emerging approaches on managing workplace diversity
- ❖ organizational policies and procedures
- ❖ applicable legislation, e.g., labour, liquor
- ❖ union agreements, if applicable
- ❖ organizational structure
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

11.01 Determine workforce requirements

Knowledge of:

- requirements of event plans
- benefits and implications of workplace diversity

- budget restrictions
- historical data
- staff turnover numbers and reasons for turnover
- suppliers' obligations and deliverables

Ability to:

- conduct task/function analysis
- assess benefits, costs and risks to organization in relation to volunteer involvement, e.g., requirement for additional insurance
- determine roles and responsibilities of staff and volunteers
- determine human resources needed for particular event
- determine human resources needed for organization
- determine wage rates and salary expectations
- develop plans that show respect for workplace diversity
- select recruitment techniques to address shortfalls

11.02 Establish workforce policies and procedures

Knowledge of:

- shift requirements
- team building principles and practices

Ability to:

- establish policies in applicable areas, such as:
 - recruitment/auditions
 - orientation
 - training
 - supervision
 - performance reviews
 - conflict resolution
 - discipline
 - termination
 - roles and responsibilities
 - rewards and recognition, e.g., volunteer rewards
- ensure that proposed policies and procedures comply with legislation
- communicate policies and procedures to staff
- monitor implementation of policies and procedures

11.03 Develop training plan

Knowledge of:

- performance expectations
- local employment conditions
- working culture and practices of industry sector
- learning initiatives and arrangements that apply to industry sector

Ability to:

- assess current skills and abilities of staff/volunteers and organization as a whole
- identify gaps in training, e.g., identify common customer complaints, identify changes to technology
- prioritize training needs
- estimate time required to complete training
- research current training trends
- review budget and determine funds available for training
- set measurable objectives
- address gaps in training through external or internal training strategies
- develop criteria to evaluate success of training plans
- put resources and policies in place to support training, e.g., time off to attend sessions
- identify specialists or expertise needed to provide instruction

11.04 Monitor human resources plan

Knowledge of:

- local employment conditions
- staff turnover rates for industry

- staffing shortfalls
- current skills and abilities of staff/volunteers
- current wage rates
- performance appraisal process

Ability to:

- measure staff turnover and reasons for leaving
- adjust human resources to address trends and issues
- review and update job descriptions
- conduct performance appraisals

BLOCK F **HUMAN RESOURCES**
Task 12 **Acquire Staff and Volunteers**

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 12

- ❖ job descriptions
- ❖ applicable legislation, e.g., labour
- ❖ organizational structure
- ❖ organizational policies and procedures
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

12.01 Develop selection criteria

- Knowledge of:
- local employment conditions
 - equality and diversity issues
 - skill sets required for specific positions

Ability to:

- seek input from current staff about duties and responsibilities
- review documentation as required, for example:
 - labour legislation
 - organizational chart
 - comments from exit interviews
- document job requirements, for example:
 - job title
 - summary of duties
 - required qualifications and skill sets
 - level of responsibility, authority and accountability
 - wages and/or benefits
 - days/hours of work or time commitment required
 - grooming and dress codes

12.02 Recruit staff and volunteers

- Knowledge of:
- recruiting methods
 - costs associated with recruitment
 - budget restrictions
 - motivational patterns for volunteers
 - sources for volunteers
 - security checks

Ability to:

- determine best methods for recruiting target group, for example:
 - promote opportunities through local media
 - promote within organization
 - seek referrals through networking

- participate in work education programs
- review applications on file
- contact or hire employment agency
- ensure process is fair, consistent, and effective
- design recruitment ads if required, including:
 - job description
 - minimum qualifications
 - how to apply
 - deadline for applying
 - contact information
- ensure recruitment information is clear and accurate
- consult with supervisors to assist with recruitment
- implement recruiting method, e.g., attend job trade fair
- screen applicants by comparing applications to requirements:
 - complete pre-employment security or police record checks, if required
- select applicants for interview process based on objective criteria

12.03 Interview candidates

Knowledge of:

- evaluation criteria

Ability to:

- prepare for the interview, including:
 - preparing questions and evaluation criteria
 - assembling necessary documents, e.g., wage scales, job descriptions
 - ensuring that content expert is present if necessary, e.g., food and beverage expert
 - selecting quiet, comfortable place for interview
 - scheduling applicants
- greet applicant and put at ease
- introduce self and other members of the interview team
- review key information from application form
- provide applicant with overview of organization and position
- gain insight into applicant's personality and skills by asking open-ended questions, e.g., inquiring about strengths and weaknesses
- explain the selection process
- encourage questions
- determine applicant's available starting date and compensation expectations
- record comments and ratings based on evaluation criteria

12.04 Select best candidate and offer position

Knowledge of:

- evaluation criteria

Ability to:

- review comments and ratings from interview forms
- rank candidates
- contact references to verify information, e.g., past performance, dates of employment
- perform other security or reference checks, e.g., driver's abstract, police record check
- test candidate's skills, if applicable
- select most suitable candidate and alternates
- contact most suitable candidate to offer position and confirm details, e.g., commencement date, benefits
- allow reasonable time frame for response
- determine reason if candidate declines offer
- provide written offer if candidate accepts:
 - may include a contract and confidentiality or privacy agreement
- notify unsuccessful candidates
- process and file documentation

BLOCK F
Task 13

HUMAN RESOURCES
Train Staff and Volunteers

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 13

- ❖ mission statement, goals and objectives of event and organization
- ❖ event features and details
- ❖ job descriptions
- ❖ applicable legislation, e.g., labour
- ❖ union agreements, if applicable
- ❖ organizational structure
- ❖ organizational policies and procedures
- ❖ communication protocols and reporting structures
- ❖ current knowledge, understanding and skills of staff
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

13.01 Provide orientation

Knowledge of:

- importance of recognizing individual and team contributions

Ability to:

- liaise with colleagues to ensure orientation is conducted in a way that minimizes disruptions
- welcome new staff/volunteers to the organization
- inform staff/volunteers about organization, e.g., structure, policies and procedures, culture
- clarify roles, responsibilities and levels of authority
- encourage questions
- conduct tour of workplace or event site
- introduce staff/volunteers to others in the organization
- provide documentation, if needed, e.g., event briefing
- identify areas that may require training, for example:
 - knowledge of legislation, e.g., liquor laws
 - cash controls
 - expense accounts
 - office equipment operation
 - emergency/risk management procedures
- finalize and file documentation

13.02 Provide training

Knowledge of:

- training program development and delivery methods
- subject matter to be taught
- learning styles and teaching methods
- roles of staff, including limits of responsibilities and their personal work objectives

Ability to:

- assess training needs, physical and financial resources and time restrictions
- set measurable objectives
- research existing programs
- prepare training programs, including:
 - subject(s)
 - list of participants
 - method of delivery to meet learning styles of participants
 - equipment required
 - opportunities for practice
 - length of program
 - time, date and location

- instructors
- method of evaluation
- conduct the training session
- recognize successful completion of training
- evaluate effectiveness of the training program
- adjust the program if necessary

BLOCK F HUMAN RESOURCES
 Task 14 Manage Workforce Relations

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 14

- ❖ job descriptions
- ❖ applicable legislation, e.g., labour
- ❖ union agreements, if applicable
- ❖ organizational structure
- ❖ organizational policies and procedures
- ❖ performance expectations

SUBTASKS		KNOWLEDGE AND ABILITIES
14.01	Supervise staff and volunteers	<p>Knowledge of:</p> <ul style="list-style-type: none"> • importance of feedback, mentoring and coaching • methods of recognizing and rewarding employees • conflict resolution <p>Ability to:</p> <ul style="list-style-type: none"> • model high standards of performance and behaviour, e.g., promote acceptance of workplace diversity • communicate expectations, roles and responsibilities of team members and leaders • promote teamwork • resolve conflicts • coach and mentor staff • delegate tasks and responsibilities • monitor individual and team performance towards goal(s) • provide regular feedback on job performance • identify training needs and set priorities with staff • address performance problems
14.02	Motivate staff and volunteers	<p>Knowledge of:</p> <ul style="list-style-type: none"> • motivational techniques, e.g., empowerment, providing sense of ownership • importance of maximizing volunteer retention <p>Ability to:</p> <ul style="list-style-type: none"> • identify individual motivational needs of staff and volunteers, e.g., socialization, experience, acknowledgement, status • accommodate individual needs • provide additional guidance and training • use positive reinforcement • use incentives where appropriate • recognize and reward efforts, e.g., letter, wind-up party, gift, letter of achievement
14.03	Manage teams	<p>Knowledge of:</p> <ul style="list-style-type: none"> • purpose of team • required mix of expertise, knowledge and skills to achieve team purpose

- appropriate leadership style
- team dynamics and stages of growth

Ability to:

- clearly communicate purpose of team
- set measureable objectives
- identify staff/volunteers' areas of expertise, knowledge, skills, attitudes and their roles within the team
- select staff/volunteers to build team and recruit staff to fill in gaps
- agree on acceptable team behaviours that will help team achieve goals
- support introduction of new team members
- allow time for team to grow together and develop into a unit
- review team performance at critical points, e.g., review key performance indicators
- encourage open communication between team members to:
 - provide feedback on each other and team as a whole
 - find solutions to problems
- help individuals understand their contributions to the team
- celebrate team and individual successes
- disband team when purpose has been achieved

14.04 Evaluate staff

Ability to:

- select best format of performance review for purposes
- provide regular feedback on performance
- prepare for periodic performance review, e.g., schedule, review job performance
- conduct periodic performance review, including:
 - state purpose of review
 - begin and end with positive feedback
 - compare performance to job requirements
 - seek input, feedback and discussion
 - discuss and agree on follow-up plans
 - update follow-up plans
- document information related to performance

14.05 Process terminations and resignations

Ability to:

- determine reasons for resignation, e.g., conduct exit interview
- provide reasons for termination
- provide copies of required documentation
- explain details of compensation and benefits, if applicable
- take security measures if necessary, e.g., escort staff off premises, change access and security codes
- notify others who may be affected by termination or resignation, e.g., payroll, customers, suppliers
- complete appropriate documentation

BLOCK G STAKEHOLDER MANAGEMENT
 Task 15 Manage Stakeholder Relationships

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 15

- ❖ mission statement, goals and objectives of event and organization
- ❖ event details, e.g., features, critical path

SUBTASKS		KNOWLEDGE AND ABILITIES
15.01	Identify stakeholders	Ability to: <ul style="list-style-type: none"> • identify internal and external stakeholders and constituencies, e.g., clients, officials, sponsors, participants, providers • define stakeholder interest, issues and priorities • determine the opportunities and challenges that each stakeholder presents
15.02	Assess stakeholders	Ability to: <ul style="list-style-type: none"> • determine potential impacts of stakeholders on event, and vice versa • assess validity, power and urgency of each stakeholder • measure each stakeholder's influence • determine stakeholder roles and desired support and resulting obligations • develop plans for acquiring strategic, economic and political alliances locally, regionally and nationally
15.03	Classify stakeholders	Ability to: <ul style="list-style-type: none"> • categorize stakeholders and stakeholder groups • prioritize stakeholders according to power, influence and interest • identify linkages between stakeholder groups
15.04	Manage stakeholder activities	Knowledge of: <ul style="list-style-type: none"> • applicable legislation, e.g., liquor laws • appropriate protocols, e.g., dress code, VIP treatment Ability to: <ul style="list-style-type: none"> • recognize and integrate varied interests and goals of stakeholders • determine activities that meet the needs of stakeholders, e.g., site tours, pre-launch party, donor appreciation program, committee meetings • acknowledge and monitor stakeholder concerns and capabilities • follow appropriate protocols when communicating with stakeholders • communicate appropriate protocols to stakeholders • sequence and synchronize activities • develop schedules of activities • liaise with all stakeholders
15.05	Manage attendee/customer service	Knowledge of: <ul style="list-style-type: none"> • codes of practice and ethics including customer and consumer rights • legal and regulatory requirements • event products and services • event attendees/customers • attendee/customer satisfaction survey methods • strengths and weaknesses of products and services • competitors' activities, products and services Ability to: <ul style="list-style-type: none"> • ensure staff understand expectations of attendees/customers • ensure staff understand their own roles and responsibilities for meeting

- attendee/customer expectations
 - empower staff to deliver good attendee/customer service
 - ensure that clear and effective conflict resolution processes are in place
 - investigate and resolve reoccurring problems
 - communicate acceptable day-to-day behaviour that matches organization's values
 - recognize contribution of 'front line' staff who work with attendees/customers
 - establish system to evaluate/monitor attendee/customer satisfaction
 - make recommendations to improve service
-

BLOCK H EVENT DESIGN
 Task 16 Design Program

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 16

- ❖ mission statement, goals and objectives of event and organization
- ❖ creative concept and theme of event
- ❖ target market(s)
- ❖ previous entertainment/performance programs
- ❖ budgetary restrictions, constraints and financial targets
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

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|-------|------------------------------|---|
| 16.01 | Determine program components | <p>Knowledge of:</p> <ul style="list-style-type: none"> • program components, e.g., activities, food and beverage, décor and design, educational sessions • structure and sequence of program components • sources of human, physical and financial resources <p>Ability to:</p> <ul style="list-style-type: none"> • review previous year(s)' program and evaluation report, if applicable • review previous successful components • research new ideas: <ul style="list-style-type: none"> - review programs of other similar events - survey target market(s) - identify attendee expectations, e.g., conduct brainstorming and other idea-generating exercises - identify opportunities for innovation • identify desired program components, e.g., speakers, entertainment, attractions, activities, ancillary programs • ensure desired components meet legal and regulatory requirements • consider requirements, roles and responsibilities of different areas, e.g., food and beverage service, entertainment • obtain cost estimates and discuss details with colleagues, as applicable • obtain support of stakeholders for program components |
|-------|------------------------------|---|
-

- | | | |
|-------|---|---|
| 16.02 | Select program content and delivery formats | <p>Knowledge of:</p> <ul style="list-style-type: none"> • education and learning principles • event theme and logo • desired program components • projected attendance • legal requirements • marketing activities • participation patterns • leisure consumption patterns • social recreation participation curve |
|-------|---|---|

Ability to:

- research options, e.g., send out requests for proposals/bids, contact agents, identify key personnel, communicate event needs with program participants
- match program format and outcomes to stakeholder objectives
- select options that meet needs and constraints, e.g., legal, site, budget
- consider compatibility to theme, other program components and marketing strategies
- secure program components:
 - agree on conditions/expectations/deliverables
 - agree on provision of program component requirements, e.g., technical needs
- determine requirements for each program component, e.g., production times
- determine necessary support materials, e.g., prizes, gifts, honoraria
- present program content and delivery formats to stakeholders for input and approval, as necessary
- allocate required resources

16.03 Structure and sequence program components

Knowledge of:

- program components' requirements
- contract requirements
- time frame
- event critical path
- site design
- marketing activities
- program sequencing tools, e.g., flow charts, Gantt charts, meeting minutes
- integrated communication plan

Ability to:

- determine location and duration requirements for each program component
- consider pace, set-up requirements
- identify contiguous and concurrent program components
- accommodate protocols for ceremonial/religious components
- accommodate marketing activity requirements, e.g., contest winners, competitions, announcements
- compile program agenda
- allocate roles to personnel appropriate to their responsibilities and skills
- allocate resources that make best use of what is available
- develop contingency plan for program components
- develop required documents, including:
 - script, if required
 - detailed agenda
 - production schedule

BLOCK H EVENT DESIGN

Task 17 Engage Performers and Entertainers

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 17

- ❖ applicable legislation, e.g., labour
- ❖ organizational structure, policies and procedures
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

17.01 Determine event requirements for performers

Knowledge of:

- times, locations or activities that require performers, e.g., special situations that would be enhanced by a performer
- requirements for performers, e.g., costs, legislation, union agreements
- types of performers, e.g., musicians, presenters

Ability to:

- review event plans to determine situations that would be enhanced by a performer
 - determine types of performers best suited for specific activities
 - source entertainers, e.g., use directories
-

17.02 Develop audition criteria

Knowledge of:

- audience demographics
- type of performance required
- proposed time, duration and location
- local employment conditions

Ability to:

- seek input on selection criteria
 - document selection criteria, for example:
 - type of performer/nature of performance required
 - duration and location of performance
 - wages and/or benefits
 - hours of work or time commitment required
 - grooming and dress codes
 - use selection criteria to choose suitable performers for auditions
-

17.03 Audition candidates

Knowledge of:

- audition criteria

Ability to:

- prepare for audition, including:
 - questions and audition criteria
 - location for auditions
 - selection committee
 - schedule applicants for auditions
 - greet applicants and put at ease
 - review key information, e.g., an overview of requirements
 - ask questions to gain insight into the performance and applicant's availability
 - observe the performance
 - explain the selection process
 - record comments and ratings based on audition criteria
 - discuss ratings
 - select best applicant
-

17.04 Prepare and monitor performer contracts

Knowledge of:

- principles of negotiation, stages of negotiating and different negotiation techniques
- components of legal contracts
- event requirements

Ability to:

- identify requirements for contract:
 - prepare specifications
- negotiate contracts:
 - strive for beneficial outcomes for all parties involved
 - determine what is negotiable and non-negotiable
 - explain own position and viewpoint
 - discuss options
 - agree on viable option, e.g., service, timelines
 - agree on sources of information for evaluation
- monitor regularly to ensure own organization and contractors are fulfilling obligations
- maintain productive relationship with contractors
- integrate contractual obligations into event's critical path

- follow up on issues:
 - agree on action to rectify non-compliance
 - deal with breaches of contract within acceptable time frame
- evaluate contractors' performances to identify strengths and weaknesses

BLOCK H EVENT DESIGN
 Task 18 Coordinate Food and Beverage Services

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 18

- ❖ event profile, features, budget and theme
- ❖ target market(s)
- ❖ applicable legislation, e.g., liquor laws, public health, food safety, responsible beverage service
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

18.01 Determine food and beverage service requirements

Knowledge of:

- operational constraints due to venue, site or climatic conditions
- dietary needs or concerns
- principles and practices of food safety for preparation, transport and storage of food

Ability to:

- conduct a needs assessment, e.g., type of function, number of people/meals, special diets, budget
- identify considerations, for example:
 - theme
 - sponsors
 - licensing requirements
 - audience research
 - trends
- develop guidelines for, for example:
 - acquiring products and services, e.g., tendering, direct purchase
 - meeting training needs, e.g., alcohol server intervention
 - establishing controls, e.g., quality, security
 - methods of distribution, e.g., paid or complimentary
 - concessions and site use
- comply with:
 - legislation, e.g., liquor, public health
 - sponsors' expectations, e.g., benefits, exclusivity
- confirm date, time and location of food and beverage services
- perform quantity calculations
- determine supplies and equipment required, e.g., dishes, cutlery, glasses, tables, table linens, ice, tickets
- arrange for:
 - equipment to be set up and operational
 - supplies to be delivered and available
 - delivery, storage, returns and recycling of bottles
 - security for cash, alcohol and tickets
 - staff training in responsible beverage service
- schedule staff:
 - determine number of staff required
 - determine tasks to be completed
- post schedule

18.02 Select menu(s)

Knowledge of:

- principles and practices of food safety for preparation, transport and storage of food
- dietary needs or concerns

Ability to:

- determine requirements for meal services:
 - type of menu required
 - arrangements to meet dietary needs or concerns
 - number of people
 - cancellation policy
 - margin for adjustment, e.g., 10%
 - date to finalize
- determine requirements for refreshment and beverage services:
 - supplies, e.g., alcohol, mixes, condiments, glassware, ice
 - type of bar service, e.g., cash or host
- address storage, e.g., refrigeration, space requirements
- set menus:
 - consult with convener or sponsor
 - incorporate nutritional requirements
 - accommodate dietary restrictions
 - address cost considerations
- ensure that serving staff are knowledgeable about menu and ingredients

18.03 Plan service style(s)

Knowledge of:

- types of service styles
- principles and practices of food safety for preparation, transport and storage of food

Ability to:

- identify appropriate service style(s) for event, e.g., table service, cocktail service, buffet, concessions
- identify possible room set-ups:
 - check layout and amenities, e.g., electrical, water, service and storage areas
- select service style(s) for event
- assess equipment and supply requirements:
 - develop checklist of needs
 - arrange delivery of equipment and supplies
- develop service style plan, for example:
 - timing
 - staffing
 - equipment
- confirm arrangements with suppliers

18.04 Select food and beverage provider(s)

Knowledge of:

- qualified food and beverage providers
- on-site and off-site food and beverage capabilities

Ability to:

- conduct research for best value/price
- source food and beverage suppliers
- select food and beverage provider(s)
- for food service provider:
 - set menu, service style and pricing
 - confirm estimated numbers of meals/people
 - confirm timing
- for beverage service provider, arrange for:
 - supplies and equipment, e.g., alcohol, mixes, glassware, condiments, ices
 - equipment to be set up and operational
 - supplies to be delivered or available
 - delivery, storage, returns and recycling of bottles

- security for cash, alcohol and tickets
- sign and date service contracts
- maintain communication as event approaches

18.05 Manage alcohol service

- Knowledge of:
- training programs

- Ability to:
- identify applicable legislation, e.g., legal drinking age
 - address liabilities and insurance requirements
 - identify type of alcohol service, e.g., cash bar, host bar
 - ensure that staff are trained in responsible beverage service
 - monitor alcohol service

BLOCK H EVENT DESIGN

Task 19 Design Environment

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 19

- ❖ event theme and branding
- ❖ target market(s)
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

19.01 Establish artistic and functional requirements

- Knowledge of:
- design concepts that enhance attractiveness and functionality of an event
 - applicable legislation, e.g., special effects, capacity
 - entertainment/leisure industry

- Ability to:
- incorporate movement, methodology and message into design concept
 - design an environment that:
 - enhances performance
 - encourages desired behaviour
 - integrate theme, branding and ambience into event environment
 - determine needs, e.g., decorations, signs, props, special effects
 - comply with legislation, e.g., balloon releases, fireworks, lasers, capacity

19.02 Select décor and furnishings

- Knowledge of:
- importance of décor elements for functional and experiential contexts
 - props, scenery, decorations
 - creating macro and micro environments

- Ability to:
- review theme, budget and objectives of event
 - identify assets and limitations of site
 - determine desired atmosphere for event
 - design elements of décor plan:
 - incorporate event theme and images
 - incorporate sponsor images as required
 - incorporate audiovisual or technical elements as appropriate
 - comply with legislation, e.g., fire-retardant materials
 - submit draft plan for approval as necessary, e.g., board of directors, clients
 - communicate plan to appropriate parties, e.g., site manager, event coordinator
 - source décor and furnishing suppliers

- secure selected décor and furnishings

19.03 Coordinate event signage

Knowledge of:

- importance of effective signage
- signage systems
- people and vehicular traffic patterns and traffic flow design

Ability to:

- identify signage requirements for event
- develop signage system that provides information, identification and directions
- select signage that enhances desired and/or required traffic flow
- source and select appropriate suppliers
- coordinate installation and placement of signage at event

BLOCK H EVENT DESIGN
Task 20 Manage Technical Production

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 20

- ❖ product and service terminology, features and options and current technology in key areas of staging, e.g., lighting
- ❖ applicable legislation, e.g., permits, occupational health and safety
- ❖ risk management, e.g., safety considerations
- ❖ problem solving and decision making
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

20.01 Determine requirements for staging and technical equipment

Knowledge of:

- installation and operation of production elements
- physical constraints of event site

Ability to:

- review program elements
- interview providers
- determine staging needs, e.g., size, height, surface, capacity
- determine equipment needs, e.g., lighting, sound, audiovisual, infrastructure, safety equipment, special effects
- secure permits or approvals for staging and equipment
- specify spatial, temporal and infrastructure requirements and restrictions

20.02 Acquire staging and technical equipment

Knowledge of:

- event staging and technical equipment specifications
- qualified suppliers and contractors

Ability to:

- develop specifications:
 - detail precise requirements for staging and equipment to be acquired
 - use proper product and service terminology
- source suppliers and contractors:
 - obtain quotes as necessary
 - negotiate and obtain staging and equipment

20.03 Install staging and technical equipment

Knowledge of:

- installation of staging and equipment

- mechanics of production installation
- skilled personnel for installation
- hiring process for installation specialists
- contingency plans

Ability to:

- coordinate logistics of installing staging and equipment within event site, e.g., timing of arrival and delivery, placement
- address safety issues or concerns, e.g., electrical cords
- ensure availability of installation equipment, machinery, tools and other assistive devices
- hire skilled installation professionals as required, e.g., stagehands, riggers, electricians
- monitor installation to identify necessary adjustments
- tour stage area with appropriate person (e.g., technician, stage manager) to ensure that requirements have been met for:
 - stage
 - lighting and audiovisual
 - special effects
 - stage security and safety
 - storage areas
- make arrangements to address concerns

20.04 Oversee technical production operation

Knowledge of:

- stage management, including typical problems and resolutions
- team leading and delegating

Ability to:

- monitor and maintain safety and integrity of staging and equipment, e.g., power and floor loads
- identify location from which technicians will operate, e.g., booth, table, area, trailer
- liaise with technical director and equipment operators as needed
- communicate roles, responsibilities, restrictions and timelines with technical personnel
- provide sufficient time and access for performer and technical rehearsals and equipment checks:
 - evaluate all elements of program, e.g., program content, entertainers, sound, special effects
 - adjust timing and sequencing if necessary
- monitor and resolve technical issues during event:
 - minimize disruption to performance or program

BLOCK H EVENT DESIGN

Task 21 Develop Plan for Attendee/Participant Management

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 21

- ❖ event profile, features and budget
- ❖ applicable legislation
- ❖ event plans, e.g., critical path
- ❖ attendee/participant needs

SUBTASKS

KNOWLEDGE AND ABILITIES

21.01 Develop admittance credential systems

Knowledge of:

- admission and access control methods
- admittance credentialing systems

- registration methods
- ticketing systems
- admission support systems, e.g., crowd control, ushers, signage

Ability to:

- analyze needs and requirements, e.g., capacity, criteria of access, restrictions
- determine admission systems, e.g., registration procedures, ticketing
- determine admittance credentials to be used, e.g., tickets, name tags, photo identification, wristbands
- select technology to support admission systems
- consult with specialists (e.g., local police, security company) as required
- draft plan for admittance, including:
 - criteria
 - levels, e.g., general admission, VIPs
 - methods
 - security
 - requirements for other on-site admission
 - communication policy
- obtain approval for admittance credential systems from appropriate parties, e.g., board of directors

21.02 Select crowd management techniques

Knowledge of:

- communication plan
- access control methods
- traffic flow, circulation and congregation management
- queue management
- sources of specialist assistance in relation to crowd control, e.g., security companies, police
- technology and equipment used in crowd management
- specific risk management issues associated with crowds

Ability to:

- develop crowd management strategies for:
 - traffic flow
 - circulation
 - congregation
 - conditions exceeding thresholds
 - attendee behaviour and restrictions
- determine appropriate entry and exit locations, considering:
 - admittance credentials
 - seating systems
 - safety
 - traffic flow
- develop queue management if necessary
- ensure that space, facilities and services are adequate for attendees:
 - verify that adequate signage is used
- ensure contingency and critical incident procedures are in place
- communicate policies and expectations regarding attendee behaviour and restrictions
- use systems and personnel to manage and monitor crowd conditions and behaviour:
 - have systems in place to respond to situations that exceed pre-established thresholds
- obtain services and equipment, for example:
 - ushers
 - security
 - signs
 - barricades

21.03 Coordinate hospitality

Knowledge of:

- local events and attractions

- hospitality protocol
- target market(s)

Ability to:

- determine hospitality requirements
- organize hospitality services and facilities, for example:
 - designate reception areas
 - book tickets for local events and attractions
 - arrange for transportation
 - arrange food and beverage services
 - arrange for information on local events/attractions
- make arrangements for hospitality services

21.04 Coordinate accommodation and transportation

Knowledge of:

- types of accommodation and transportation available
- reservation procedures and policies
- cancellation policies
- deposit requirements
- payment procedures

Ability to:

- coordinate accommodation:
 - analyze needs and options, e.g., block of rooms, dates required, release dates
 - negotiate and contract room blocks and rates
 - inform participants of reservation process and responsibility, e.g., housing bureau, self-booking
 - monitor room bookings and rooming lists if necessary
- coordinate transportation:
 - analyze needs and options, e.g., airlines, taxis, charter buses
 - negotiate and contract suppliers
 - inform participants of reservation process and responsibility, e.g., deadlines, rates, self-booking

21.05 Manage protocol requirements

Knowledge of:

- precedence
- titles
- styles of address
- honour and salutes
- flags
- religious or ritual requirements
- event logistics

Ability to:

- determine protocol requirements for:
 - invitations
 - reception room
 - seating arrangements
 - introductions
 - transportation
 - accommodation
 - security
- secure appropriate personnel, e.g., to conduct ceremonies, to accompany VIPs
- arrange for ceremonial equipment, e.g., flags
- coordinate logistical requirements, e.g., to arrange food and beverage or transportation needs of VIPs

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 22

- ❖ mission statement, goals and objectives of event and organization
- ❖ event profile, features and budget
- ❖ event plans, e.g., critical path

SUBTASKS	KNOWLEDGE AND ABILITIES
22.01 Determine site specifications	<p>Knowledge of:</p> <ul style="list-style-type: none"> • target market(s) • type of venues • accessibility needs of special populations, e.g., mobility-challenged • special seating arrangements, e.g., VIPs <p>Ability to:</p> <ul style="list-style-type: none"> • review nature, scope, complexity and fiscal requirements of event, e.g., budget, profile and image, facilities licensing, season, anticipated attendance, flexibility, accessibility (including disabled), security needs • determine desired or required geographic location and type of facility for event • define spatial, proximity, and housing patterns and accessibility requirements for site • identify dates and durations of site occupancy • develop site selection checklist
22.02 Source and inspect sites	<p>Knowledge of:</p> <ul style="list-style-type: none"> • event industry • selection criteria • site infrastructure • risk management factors <p>Ability to:</p> <ul style="list-style-type: none"> • research potential sites, e.g., review sites of similar types and scopes of events • conduct site inspection: <ul style="list-style-type: none"> - investigate and evaluate site, e.g., use site checklist - verify viability of facilities and services • prioritize selection criteria • evaluate possible sites, for example: <ul style="list-style-type: none"> - evaluate location based on ease of access, proximity to hotels and availability of parking in area - rate sites based on dates, rates, space and other capabilities or constraints • determine best site and communicate information to colleagues and key stakeholders to secure approval • reserve and confirm site, e.g., negotiate and contract facility, outline responsibilities • manage site contractual process • maintain and develop effective working relationship with venue personnel

COMMON KNOWLEDGE

❖ *not applicable*

Note: These knowledge statements apply to all Subtasks in Task 23

SUBTASKS	KNOWLEDGE AND ABILITIES
23.01 Design site layout	<p>Knowledge of:</p> <ul style="list-style-type: none"> • event profile, features, budget and program • event concept and theme • site infrastructure and capacity • budgetary constraints • applicable legislation, e.g., access, fire codes • site design and site planning, e.g., access points, location of emergency exits <p>Ability to:</p> <ul style="list-style-type: none"> • determine needs, for example: <ul style="list-style-type: none"> - space - structures—fixed and temporary - utilities, e.g., power, water, sewage, gas - parking - communications - areas for first aid and lost children - emergency access - bylaw requirements, e.g., fire regulations • confirm location of structures and facilities within site • draft site plan, recognizing: <ul style="list-style-type: none"> - structures—existing permanent and temporary - facilities - services - event program - attractions - human and vehicular traffic flow - environmental implications - best use of resources - security • establish space assignments and set-up configurations: <ul style="list-style-type: none"> - obtain expert advice on configuration when needed - build in flexibility to allow for adjustments - detail placement and configuration, e.g., orientation of temporary structure openings • inspect site and review site plan, for example: <ul style="list-style-type: none"> - accessibility - washrooms - obstructions - capacity limits - loading dock or loading entrance - special needs parking - vehicle road access - utilities • prepare accurate scale diagrams as required • inform organization/stakeholders/clients when changes are necessary, e.g., when a planned temporary structure cannot be installed • adjust site plan as required • obtain support of key stakeholders for planned layout <p>.....</p>

BLOCK I
Task 24

SITE MANAGEMENT
Manage Event Site

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 24

- ❖ event profile, features and budget
- ❖ applicable legislation, e.g., occupancy, fire codes, occupational health and safety
- ❖ roles and responsibilities of individuals
- ❖ problem solving and decision making
- ❖ team leading and delegating
- ❖ health, safety and security considerations
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

24.01

Create logistics action plan for site set-up and take-down

Knowledge of:

- timing and sequencing
- human resources
- existing physical resources

Ability to:

- confirm access to site, e.g., specific date(s) and time(s)
- prepare detailed production schedule, including:
 - floor plans
 - timing
 - personnel required
 - roles and responsibilities
- make arrangements for shipping/receiving and storage
- ensure that human resources are available for set-up and take-down
- define and implement site close-out requirements and restoration including key contact points
- communicate plan to appropriate individuals
- integrate plan with other aspects of event

24.02

Set up site

Knowledge of:

- site set-up and take-down action plan
- contractual obligations with suppliers
- delivery schedules

Ability to:

- confirm access to site
- communicate production schedule and responsibilities to appropriate individuals, e.g., staff, suppliers
- arrange for human resources:
 - ensure personnel are familiar with equipment being used
- follow up to ensure progress according to production schedule, for example:
 - arrival of services, deliveries and equipment
 - arrival of related groups
 - technical rehearsal time and performer/participant orientation
 - special facilities, e.g., dressing rooms, guest rooms/lounges, equipment rooms, team rooms
- ensure rented equipment is checked and operational
- liaise with facility management and site-specific personnel as appropriate
- liaise with appropriate colleagues and outside service people, e.g., refer issues outside area of responsibility to appropriate personnel
- adapt plan to changing circumstances as necessary:
 - brief all personnel involved

24.03 Monitor site during event

Knowledge of:

- typical systems, procedures and logistics for on-site management
- techniques for managing stress and time during operation of event
- contractual obligations
- risk management
- contingency plans

Ability to:

- monitor event operation through observation and appropriate communication and control mechanisms
- identify and analyze operational problems or need for additional services as issues arise
- implement solutions to problems immediately
- liaise with appropriate parties (e.g., clients) throughout event to ensure it is progressing to their satisfaction
- monitor and ensure effective delivery of services through ongoing liaison with contractors

24.04 Take down site

Knowledge of:

- site set-up and take-down action plans
- contractual obligations
- environmental considerations
- health, safety and security considerations
- time allotted for take-down

Ability to:

- communicate production schedule and responsibilities to appropriate individuals, e.g., staff, suppliers
- coordinate withdrawal of services and equipment, e.g., arrange for utilities to be disconnected
- allow enough time for take-down
- arrange for human resources
- arrange for specialized equipment if required
- plan take-down of temporary structures:
 - provide plans for handling wet and/or dirty fabrics
- clean, count, and pack equipment:
 - check for missing and/or damaged items
 - return rented equipment
 - repair and store equipment
- liaise with appropriate colleagues and outside service people
- return site to condition specified in contract/agreement, for example:
 - ensure equipment is checked and operational
 - confirm suppliers have removed their items from site
 - remove hazards caused by installation of temporary structures
 - remove waste and decorations:
 - o consider recycling options
- conduct site inspection with facility representative to ensure that site clean-up is satisfactory
- debrief personnel and identify relevant points for event evaluation
- complete all relevant documents and records according to organization's procedures

BLOCK I
Task 25

SITE MANAGEMENT
Manage Site Infrastructure

COMMON KNOWLEDGE

Note: These knowledge statements

- ❖ event profile, features and budget
- ❖ event infrastructure components
- ❖ infrastructure resources

apply to all Subtasks in Task 25

- ❖ applicable legislation, e.g., bylaws, public health, fire codes
- ❖ health, safety and security considerations
- ❖ event plans, e.g., critical path

SUBTASKS		KNOWLEDGE AND ABILITIES
25.01	Determine infrastructure requirements	<p>Knowledge of:</p> <ul style="list-style-type: none">• local authorities concerned with transportation• various transport options, including private and public variations for air, water and land transport <p>Ability to:</p> <ul style="list-style-type: none">• identify functional needs of event, for example:<ul style="list-style-type: none">- transport systems- parking- utilities- sanitation & waste management- registration area- temporary structures- mobile catering units- support systems, e.g., medical, shipping/receiving- security requirements• estimate demand for transport systems• identify demand for parking and types of vehicles to be accommodated• consider need for involvement of authorities in transportation planning process, e.g., emergency services, local government• consider utility requirements, e.g., power, water, gas, telecommunications• comply with legislation, e.g., public health, fire codes, utility regulations <p>.....</p>
25.02	Assess existing capabilities and capacity	<p>Knowledge of:</p> <ul style="list-style-type: none">• various transport options, including private and public variations for air, water and land transport <p>Ability to:</p> <ul style="list-style-type: none">• determine existing capacity for:<ul style="list-style-type: none">- transfers and other transportation, e.g., public transit, shuttle vans, taxis- parking, e.g., remote, park & ride, overflow- electrical power- potable and non-potable water needs and supplies- gas and atmosphere control, e.g., fuel, heating, ventilation, air conditioning- telecommunications, e.g., sufficient equipment and technology- sanitation needs, e.g., public/portable toilets, hygiene- waste removal, e.g., equipment, services, recycling- janitorial and maintenance systems- support services, e.g., on-site medical services- shipping/receiving services• compare event needs with existing capabilities and capacity• identify infrastructure requirements that will have to be acquired or adjusted to meet event needs <p>.....</p>
25.03	Augment infrastructure as required	<p>Knowledge of:</p> <ul style="list-style-type: none">• contingency planning <p>Ability to:</p> <ul style="list-style-type: none">• arrange for additional services or equipment, for example:<ul style="list-style-type: none">- procure other parking as appropriate- secure supplementary sources and services for potable and non-potable water- acquire additional sanitation and waste management resources

- develop strategies to address traffic patterns and impacts on or caused by the event
- establish parking areas according to necessity, priority and proximity, e.g., VIP, vendor, handicap accessible
- develop parking services and access control strategies, e.g., parking permits and passes
- coordinate janitorial and maintenance services to ensure cleanliness and upkeep of interior and exterior areas
- arrange for temporary facilities, structures and services, e.g., tents, scaffolding, seating, workforce
- develop contingency plan, e.g., stand-by or back-up services
- comply with safety, technical, legal and regulatory requirements for installation of additional infrastructure, e.g., utilities, stages

BLOCK I SITE MANAGEMENT
 Task 26 Manage On-site Communications

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 26

- ❖ communication technology and terminology
- ❖ event plans, e.g., critical path

SUBTASKS		KNOWLEDGE AND ABILITIES
26.01	Establish communications framework	<p>Knowledge of:</p> <ul style="list-style-type: none"> • importance of communications framework • effective communication skills • communication protocols <p>Ability to:</p> <ul style="list-style-type: none"> • identify communication needs of event, e.g., individuals, event features • identify types of messages to be communicated to internal and external public and personnel, e.g., announcements, updates, results, changes: <ul style="list-style-type: none"> - outline content and style of messages to be communicated including terminology and language • create a flowchart of communication responsibilities, including: <ul style="list-style-type: none"> - outline distribution structure - identify decision-making hierarchy • develop communication resources, for example: <ul style="list-style-type: none"> - verification documentation, e.g., specifications guidebook, production book - contact lists, e.g., attendees, staff, suppliers, emergency services • set up communication channels that facilitate flow and scope of communication needs
26.02	Determine and acquire required communication equipment and resources	<p>Knowledge of:</p> <ul style="list-style-type: none"> • communication equipment and resources <p>Ability to:</p> <ul style="list-style-type: none"> • analyze needs, considering: <ul style="list-style-type: none"> - type and size of venue - users, e.g., staff and volunteers, emergency personnel • develop guidelines for: <ul style="list-style-type: none"> - issuing and maintaining equipment - users, e.g., frequencies, usage • determine technology appropriate for communication needs • obtain equipment and services, for example:

- cellular telephones
- two-way radios
- pagers
- PA system
- web-based
- integrate technology from all parts of event into communication plan, e.g., technical production, signage

26.03 Specify communication procedures and protocols

Knowledge of:

- radio protocols

Ability to:

- specify techniques for internal and external communications, e.g., written, audio, visual and electronic
- identify types of messages to be communicated
- coordinate briefing and debriefing meetings
- establish communication protocols, e.g., radio discipline
- create a plan and team for crisis or emergency situations
- ensure that on-site communication is available in a timely manner
- train staff in:
 - use of equipment
 - locations of services
 - protocol, e.g., what is appropriate to relay by radio
- monitor communication systems on-site:
 - distribute and retrieve equipment
 - ensure that protocol is followed

BLOCK J
Task 27

MARKETING
Manage Marketing Plan

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 27

- ❖ mission statement, goals and objectives of event and organization
- ❖ event profile, features and budget
- ❖ target market(s)
- ❖ event plans, e.g., critical path

SUBTASKS

KNOWLEDGE AND ABILITIES

27.01 Conduct situational analysis

Knowledge of:

- sources of market information—current and historical
- data collection and analyzing techniques
- marketing concepts, such as ‘marketing mix’

Ability to:

- review historical data, e.g., surveys, evaluations, budget
- evaluate event features, e.g., location, service, merchandise, resources, promotion, price, image
- identify strengths, weaknesses, opportunities and threats to event and/or organization
- assess target market(s)
- identify attendee/participant current and future needs and expectations
- assess competition, e.g., evaluate strengths and weaknesses
- research economic, political and social conditions
- evaluate community infrastructure and resources
- identify new marketing techniques and mediums available
- identify opportunities to expand into new markets and innovations to better meet attendee/participant needs

- identify legal and regulatory restrictions that may impact event
- summarize results of situational analysis:
 - make recommendations and conclusions considering budget and resources

27.02 Define target market segments

Knowledge of:

- target market analysis, e.g., demographic and psychographic research

Ability to:

- develop profiles of potential event attendees/participants:
 - age
 - gender
 - lifecycle stage
 - socio-economic status, e.g., income, type of work
- match target segment profile to event features, products and services
- define geographic reach of event

27.03 Develop branding for event

Knowledge of:

- event concept/theme

Ability to:

- identify unique value for target market
- position event amidst other events
- identify marketing message for each target market
- develop logo and other visual and verbal identifiers:
 - engage expertise, if required
- ensure consistency with brand and message with mission statement, goals and objectives

27.04 Select marketing medium(s)

Knowledge of:

- available marketing mediums, e.g., advertising, publicity, direct marketing, cross-promotions/partnerships, Internet (e-commerce, web marketing, online registration)
- strengths and weaknesses of different types of mediums
- event messages and branding

Ability to:

- assess available medium(s) for market penetration
- match messages to target market(s) using the best medium(s)
- select most effective medium(s):
 - consider medium(s) that provide best return on investment

27.05 Develop integrated marketing strategy

Knowledge of:

- situational analysis data
- target market segment analysis
- stakeholder needs and expectations, e.g., stakeholder package requirements
- message and brand of event
- selected marketing mediums
- legal, regulatory and ethical requirements affecting marketing of event products and services
- media contact

Ability to:

- design event marketing strategy that will complement or integrate with organization's marketing strategy
- develop schedule of marketing activities to build up to and/or during event
- integrate activities to build on and reinforce each other
- maintain consistency of marketing activities
- determine budget allocations, staff responsibilities and milestones in conjunction with event critical path

- identify resource requirements to implement plan
- forecast demand based on situational analysis
- determine marketing goals and objectives for event products and services
- prioritize event market segments in relation to products and services
- develop methods and key performance indicators to monitor effectiveness of plan
- determine required information collection and record keeping

27.06 Implement marketing plan

Knowledge of:

- available marketing mediums
- strengths and weaknesses of different types of mediums
- target market preferences
- negotiation skills

Ability to:

- communicate goals and objectives of plan and changes to plan to marketing staff
- delegate responsibilities
- determine critical dates
- coordinate activities with other aspects of event production
- monitor activities and results on ongoing basis:
 - ensure that goals and objectives are being met
 - maintain records of activities, e.g., costs, results, influencing factors
- adjust marketing plan in response to variations in performances, budget, target market behaviour and market conditions:
 - re-allocate staff and resources
 - communicate changes to stakeholders
- prepare evaluation of marketing activities

BLOCK J
Task 28

MARKETING
Manage Marketing Materials

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 28

- ❖ mission statement, goals and objectives of event and organization
- ❖ event budget, e.g., allocations
- ❖ event plans, e.g., critical path
- ❖ target market segments

SUBTASKS

KNOWLEDGE AND ABILITIES

28.01 Determine marketing materials needed for event

Knowledge of:

- available marketing media, e.g., print/imprint, electronic

Ability to:

- determine materials needed for marketing and event activities, e.g., brochures, programs, tickets
- analyze media available to meet requirements, e.g., print, electronic
- identify marketing message for each target market segment
- select suitable and cost-effective medium for each type of event material to be produced

28.02 Develop content and design parameters

Knowledge of:

- event features, theme/concept, branding and message
- materials to be produced

Ability to:

- determine style of materials
- use appropriate language and formats
- incorporate branding message, e.g., logos, slogans
- prepare content of text
- approve/prepare layout for printing and production
- monitor consistency of event theme/concept, branding and message
- secure permission to use copyrighted material as necessary
- copyright materials, if required

28.03 Produce marketing materials

Knowledge of:

- procurement plan and processes

Ability to:

- define specifications for each item
- source and solicit suitable providers
- determine delivery deadlines
- monitor quality and accuracy of text and match to specifications

28.04 Distribute marketing materials

Knowledge of:

- information management plan and requirements
- contact personnel for internal and external operations
- promotional activities schedule

Ability to:

- determine delivery method for each item produced
- develop distribution schedule
- organize and assemble materials for distribution
- comply with information management plan for archiving printed/imprinted materials

BLOCK J MARKETING
Task 29 Manage Event Merchandise

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 29

- ❖ mission statement, goals and objectives of event and organization
- ❖ event plans, e.g., critical path
- ❖ target market segments

SUBTASKS

KNOWLEDGE AND ABILITIES

29.01 Develop product(s) design and specifications

Knowledge of:

- event theme/concept, branding and message(s)
- historical data on past merchandise

Ability to:

- leverage post-event merchandising sales opportunities
- review historical data, e.g., types of merchandise, how and where sold, price points
- research customer needs and interests
- assess need to modify or discontinue existing merchandise
- assess competition, e.g., other similar products, price points, merchandising venues
- determine potential liabilities and legalities associated with merchandise
- define product design and production specifications
- identify new marketing techniques and mediums available

- identify other/new market opportunities
- integrate product concepts with other marketing activities, e.g., advertising poster upgraded to merchandise quality poster

29.02 Determine pricing

Knowledge of:

- marketing objectives
- historical data on price points of previous merchandise

Ability to:

- calculate direct and indirect costs
- determine profit requirements
- research pricing of similar merchandise:
 - assess competition
 - review historical data
- set prices for each type of merchandise considering:
 - price points for target market segments
 - merchandise quality
 - perceived value
 - opportunity for sales, e.g., one time only during the event, after the event

29.03 Control brand integrity

Knowledge of:

- event brand and messaging
- legal rights

Ability to:

- assess potential of licensing
- negotiate licensing controls and concessions
- establish specifications for commemorative or legacy products
- protect brand integrity:
 - establish means to differentiate between real product and replicas
 - control release/launch of products
- monitor internal and external merchandise sales

29.04 Produce event merchandise

Knowledge of:

- procurement plan and process
- budget allocation
- merchandise specifications
- launch dates for merchandise

Ability to:

- source suitable merchandise manufacturers
- negotiate purchase agreements
- determine quantities of merchandise
- determine import and export requirements
- monitor quality

29.05 Distribute event merchandise

Knowledge of:

- launch dates for merchandise
- procurement plan and process

Ability to:

- determine physical outlets
- determine online sales outlets
- negotiate distribution agreements
- establish inventory management systems
- determine shipping arrangements and associated shipping costs
- coordinate distribution of suitable point of purchase and other sales displays

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 30

- ❖ mission statement, goals and objectives of event and organization
- ❖ event plans, e.g., critical path
- ❖ target market segments
- ❖ event concept/theme

SUBTASKS		KNOWLEDGE AND ABILITIES
30.01	Develop advertising plan	<p>Knowledge of:</p> <ul style="list-style-type: none"> • budget allocation • evaluation plan and processes <p>Ability to:</p> <ul style="list-style-type: none"> • determine advertising needs of internal and external operations • evaluate strengths and weaknesses of available media outlets and techniques • identify suitable media outlets • negotiate and purchase media goods and services • verify delivery and evaluate performance of media buys
30.02	Develop promotional events	<p>Knowledge of:</p> <ul style="list-style-type: none"> • promotions <p>Ability to:</p> <ul style="list-style-type: none"> • evaluate strengths and weaknesses of activities that will create awareness and interest for event • determine objectives and restrictions of different promotional activities • determine liabilities and legalities of promotional activities • determine timelines, resource requirements and staff responsibilities for different activities • maximize media coverage of promotional events
30.03	Develop cross-promotional activities	<p>Knowledge of:</p> <ul style="list-style-type: none"> • official event sponsors, suppliers, donors <p>Ability to:</p> <ul style="list-style-type: none"> • assess potential partnership opportunities with sponsors, donors, suppliers and other compatible organizations • assess opportunities and costs to promote event at venues of other non-competing events with similar target market segments • select mix of activities for promotions, e.g., multi-tiered, cross promotions • negotiate reciprocal agreements for logo and brand usage • determine resource requirements, e.g., print materials and merchandise • liaise with partners • coordinate launch dates of each promotional activity
30.04	Develop contests	<p>Knowledge of:</p> <ul style="list-style-type: none"> • official event sponsors, suppliers, donors • budget allocation • branding and message <p>Ability to:</p> <ul style="list-style-type: none"> • determine type of contest(s) to hold • assess liabilities and legalities

- establish rules, regulations, selection criteria, entry procedures
- define prize system
- seek out cross-promotional opportunities with sponsors and suppliers, e.g., media supplier
- determine resource requirements, e.g., print materials
- coordinate presentation logistics

30.05 Coordinate sales promotions

Knowledge of:

- event features
- message and brand of event
- selected marketing mediums
- cross-promotional activities

Ability to:

- determine requirements for each promotional activity
- assess each activity on its ability to create demand
- determine strategies to create purchasing urgency
- develop schedule of promotional activities to build up to event
- integrate activities to build on and reinforce each other
- maintain consistency of promotional activities

BLOCK J
Task 31

MARKETING
Conduct Public Relations Activities

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 31

- ❖ mission statement, goals and objectives of event and organization
- ❖ event features, concept/theme
- ❖ event plans, e.g., critical path
- ❖ target market segments
- ❖ stakeholders' needs and expectations
- ❖ communication plan and protocols

SUBTASKS

KNOWLEDGE AND ABILITIES

31.01 Develop public relations strategy

Knowledge of:

- marketing plan and promotional activities
- communication plan

Ability to:

- define objectives for public relations
- define scope and characteristics of public:
 - segment public audience
- determine information needs of each sector of the public
- develop proactive and reactive strategies to address event and organizations' needs and objectives
- develop well articulated and credible messages to be communicated to sectors of the public

31.02 Develop publicity plan

Knowledge of:

- marketing plan and promotional activities
- key internal and external issues affecting event and/or organization

Ability to:

- identify legal, regulatory and ethical requirements affecting implementation of public relations strategies
- define public relations objectives for event

- source and select suitable media and communication outlets to reach sectors of the public
- determine resource requirements, e.g., print materials
- integrate public relations activities with advertising and promotions activities as part of overall marketing plan
- develop schedule of publicity campaign activities, e.g., media blitz, media announcements
- develop media list with contact information and protocols

31.03 Develop media relations

Knowledge of:

- publicity strategies and plan
- selected media and communication outlets
- media contacts and protocols

Ability to:

- prepare timely and newsworthy media releases
- respect and accommodate media needs and restrictions
- provide media with appropriate access and facilities
- provide accurate, credible information

31.04 Implement publicity plan

Knowledge of:

- message and brand of event
- impact of event on local community, e.g., economic benefits, spin-off benefits

Ability to:

- establish relationships with government, community and stakeholders
- identify issues and trends that may impact event objectives and/or production
- determine method to control interaction between event organization and the public
- cultivate positive image and public opinion through promotional activities, advertising campaign and publicity plan
- monitor news and stakeholder environments for anything that could affect event and event production
- evaluate effectiveness of public relations activities
- adjust plan and activities to address issues and changes to image

31.05 Manage crises and controversies

Knowledge of:

- selected media and communication outlets
- media contacts and protocols
- publicity plan
- current and emerging social concerns
- risk management plan

Ability to:

- monitor news related to event and stakeholder environments
- recognize potential of incidents to escalate
- follow communication protocols
- gather facts to verify or dispute claims
- integrate control of crises and controversies with public relations activities
- maintain consistent, agreed-upon messages in keeping with mission statement, goals and objectives of event and organization
- document findings

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 32

- ❖ mission statement, goals and objectives of event and organization
- ❖ event products, e.g., merchandise, tickets, booth/concession space, accommodation packages
- ❖ target market segments
- ❖ communication plan and protocols
- ❖ site design

SUBTASKS

KNOWLEDGE AND ABILITIES

32.01 Develop sales plan and objectives

Knowledge of:

- target market segmentation analysis and purchasing behaviour
- marketing plan
- competitors' sales practices

Ability to:

- identify legal, regulatory and ethical requirements for sales
- set sales objectives for all event products:
 - review historical data on previous sales figures
 - identify previous target market segments
- identify potential target market segments
- determine sales tools and tactics to use with each target market segment and product
- evaluate sales team abilities to maximize strengths
- set up sales organizational structure, e.g., geographically based, customer-based, product-based
- integrate sales plan and objectives with business and marketing plan strategies
- define key performance indicators of sales plan
- define sales target for sales team
- communicate sales plan and sales objectives to sales staff
- determine documentation requirements

32.02 Conduct sales activities

Knowledge of:

- sales plan and objectives, tools and tactics, targets
- principles of selling, sales communication and relationship building
- procurement plan and process

Ability to:

- integrate sales tactics with promotional and advertising activities to encourage desired consumer behaviour
- use sales tools and tactics, e.g., qualify leads, conduct sales calls, deliver sales presentations, package products, provide sales incentives, provide giveaways, use telephone sales, overcome client objections
- close sales:
 - negotiate sales details, e.g., cost/price, shipping fees
 - set dates for product delivery, e.g., booth set-up dates, merchandise delivery
- check for unauthorized on-site or remote sales activities, e.g., scalpers
- monitor and evaluate success of sales plan by comparing to key performance indicators and sales targets
- make adjustments to sales plan as required by variations in performance and timelines in meeting sales targets
- communicate changes to sales plan to key stakeholders and sales staff
- identify and correct breaches of legal, regulatory, ethical and social requirements:
 - examine causes and take corrective action or re-examine requirements
- monitor sales documentation

32.03 Determine sales platforms

Knowledge of:

- event marketing materials
- promotional activities, e.g., website
- sponsors and stakeholders
- distribution options

Ability to:

- research legal, regulatory, ethical, social responsibility requirements and cost-effectiveness of sales procedures
 - select appropriate sales platforms for target market segments and event products and services
 - determine resources for sales, e.g., gate set-up, merchandise type and quantities, booths, staff, floats, sales transaction equipment
 - determine online sales tools required, e.g., links to site, site design, secure payment software, ease of use
 - establish resources required and parameters of sale activities of authorized external sales outlets, e.g., quantity of tickets, price structure, promotional materials
-

BLOCK K PROFESSIONALISM
Task 33 Exhibit Professional Behaviour

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 33

- ❖ organizational policies and procedures
- ❖ organizational structure

SUBTASKS

KNOWLEDGE AND ABILITIES

33.01 Project a professional image

Knowledge of:

- importance of presenting a professional image
- appropriate protocols

Ability to:

- maintain professional conduct and appearance
 - exhibit:
 - approachability
 - dedication
 - flexibility
 - patience
 - follow appropriate protocols, e.g., VIP, dress codes
-

33.02 Demonstrate leadership

Knowledge of:

- own role and responsibilities
- own level of authority
- personal strengths and limitations
- strengths, limitations and potential of staff
- different leadership styles

Ability to:

- act as a role model
- delegate responsibly
- use leadership style appropriate to situations and people
- use authority appropriately
- communicate organization's and event's vision and values
- take initiative
- facilitate change

- recognize stages in team development and promote teamwork
- handle difficulties, challenges and conflict
- recognize and encourage creativity and innovation in others
- provide support to staff, especially during times of setback and/or change
- empower staff within agreed-upon limits

33.03 Demonstrate ethical behaviour

Knowledge of:

- code of ethics accepted and used by industry sector and country
- importance of acting ethically

Ability to:

- take responsibility for obligations, actions and decisions
- represent capabilities and conditions accurately and without deception
- exhibit fairness and transparency in all transactions and interactions
- adhere to ethical standards of conduct
- develop, implement and enforce policies and procedures that promote ethical practices and behaviours

33.04 Work with colleagues

Knowledge of:

- standards of behaviour and performance expected by organization
- communication plan and protocols
- appropriate protocols, e.g., dress, VIP
- event details, e.g., features, critical path
- social and cultural differences
- roles and responsibilities of colleagues

Ability to:

- identify colleagues' needs and expectations
- consult with colleagues when making decisions to obtain other points of view
- advise colleagues of difficulties that may impact work
- communicate regularly and listen to others
- respect roles, responsibilities, interests and concerns of colleagues
- identify colleagues' expertise, knowledge, skills and attitudes and their roles within group
- maintain a positive and cooperative manner
- resolve conflicts and disagreements with colleagues to minimize damage to work and activities
- monitor and review effectiveness of working relationships

33.05 Work in a diverse environment

Knowledge of:

- general characteristics and key aspects of main social and cultural groups encountered
- types of disabilities and implications for the workplace
- appropriate protocols, e.g., dress, VIP
- event details, e.g., features, critical path

Ability to:

- communicate with colleagues from diverse backgrounds
- identify issues that may cause conflict in the workplace
- accommodate colleagues and customers with special needs
- consider and understand cultural differences/etiquettes when difficulties occur
- seek assistance when required, e.g., refer to appropriate resource person

33.06 Manage time

Knowledge of:

- time management tools and how they are used
- event details, e.g., features, critical path
- interrelatedness of timelines of event elements
- implications of communication/data flow on timelines
- need to balance quality of event, timelines and deliverables

- impacts of timelines on budgets

Ability to:

- set and prioritize short- and long-term goals
- outline objectives to be achieved for each goal
- identify tasks that need to be completed for each objective:
 - prioritize tasks according to importance and urgency
 - state performance measure to be used
 - determine how much time each task will take
- use time management system, e.g., day planner, computer
- create action plans
- schedule tasks
- monitor progress of tasks and action plan
- review goals and objectives periodically

33.07 Manage stress

Knowledge of:

- when and how to say 'no'
- time management
- stressors

Ability to:

- attend to own personal, physical, emotional and spiritual needs
- maintain a sense of humour
- recognize own limitations
- identify personal indicators of stress
- recognize how own stress and attitude affects others
- establish a comfortable work environment
- take action to reduce stress, e.g., balance home and work life, set realistic goals, engage in hobbies
- ask for assistance when needed

33.08 Make decisions

Knowledge of:

- importance of timing when making decisions
- integrated communication plan
- who has final decision-making authority for all aspects of event
- importance of having all facts prior to making decisions

Ability to:

- identify issues
- assess time constraints
- identify effects on other areas of organization or event
- make choices in timely manner
- document details, action taken and results, when necessary

33.09 Solve problems

Knowledge of:

- importance of timing when solving problems
- importance of correct problem resolution, e.g., customer satisfaction, organizational efficiency

Ability to:

- identify and investigate problem
- assess severity of problem
- think creatively
- objectively analyze and determine possible solutions
- identify what can be controlled to resolve problems
- choose and implement best solution
- follow up to ensure problem is resolved
- monitor outcome
- document details, action taken and results
- communicate results to appropriate parties

33.10 Keep up to date with changes in the events industry

- Knowledge of:
- industry publications
 - industry websites
 - industry associations and their social functions

- Ability to:
- source and access information on current and emerging:
 - trends
 - ethical and legal issues
 - technology
 - network with colleagues in the events industry
 - research competition

33.11 Facilitate continuous improvement

- Knowledge of:
- best practices

- Ability to:
- develop strategies to ensure team members are encouraged to participate in decision-making processes and take initiative
 - communicate continuous improvement strategies to all stakeholders
 - monitor and adjust performance strategies, e.g., source new technology
 - improve customer service strategies through constant review of techniques and processes
 - liaise with staff and volunteers to identify opportunities for improvement

33.12 Participate in professional development activities

- Knowledge of:
- industry resources, e.g., associations, publications, educational opportunities
 - membership requirements in professional associations

- Ability to:
- participate in industry associations
 - read industry publications, e.g., journals, magazines
 - network with other event practitioners and professionals
 - participate in educational opportunities, e.g., attend courses, workshops and seminars
 - pursue professional designations/accreditations

BLOCK L COMMUNICATION
 Task 34 Conduct Business Communications

COMMON KNOWLEDGE

Note: These knowledge statements apply to all Subtasks in Task 34

- ❖ organizational policies and procedures
- ❖ organizational structure
- ❖ protocols, e.g., communications, appearance, VIP
- ❖ communication needs and preferences of audience(s), e.g., cultural differences
- ❖ meaning of technical terms and industry jargon

SUBTASKS

KNOWLEDGE AND ABILITIES

34.01 Communicate verbally

- Knowledge of:
- information requirements
 - public and non-public information
 - importance of listening
 - legal requirements

Ability to:

- consider needs and limitations of audience
 - organize ideas before speaking
 - ensure information is current, accurate and complete
 - determine appropriate time and place to deliver message
 - be concise
 - speak clearly
 - vary tone, volume, inflection and rate of speech
 - make eye contact
 - exhibit appropriate non-verbal behaviour
 - be considerate of listener(s)
 - confirm understanding, e.g., ask for feedback, review what was explained
 - encourage and answer questions
 - minimize interference or disruptions when communicating
-

34.02 Communicate in writing

Knowledge of:

- business writing formats, e.g., memos
- public and non-public information
- legal requirements

Ability to:

- provide current, accurate, complete and concise information
 - use format, tone and style suited to purpose
 - consider the audience, e.g., needs, reading ability, technical understanding
 - organize ideas logically
 - be clear and concise
 - proofread
 - keep copy on file
-

34.03 Use communication tools

Knowledge of:

- office technology

Ability to:

- use business communication technology effectively, e.g., telephone system, email
 - choose appropriate technology for the message, e.g., fax documents with signatures
 - check for messages regularly and respond in a timely fashion
-

34.04 Make effective presentations

Knowledge of:

- technology related to presentation, e.g., software, how to operate hardware

Ability to:

- identify prospective audience's background and motivation for attending presentation
 - research topic
 - organize material logically
 - use language appropriate to audience
 - speak clearly
 - vary tone, volume, inflection and rate of speech
 - be accurate
 - use presentation aids, e.g., audio, visual, print
 - prepare support materials, e.g., brochures, pamphlets, registration forms
 - arrive early and set up room
 - interact with audience, e.g., make eye contact
 - keep presentation within time limit and on topic
-

34.05 Plan and conduct

Knowledge of:

meetings

- purpose of meeting
- meeting's level of authority
- consequences of inaccurate recording and filing practices, e.g., legal implications

Ability to:

- establish purpose and objectives of meeting
 - determine who should attend meeting
 - determine type of meeting required, e.g., information-sharing, decision-making
 - confirm availability of key participants
 - prepare for meeting:
 - prepare outline or agenda
 - make meeting room arrangements
 - determine resources or materials required
 - invite participants:
 - provide sufficient notice
 - state importance and preparation required
 - provide information, e.g., agenda
 - state date, time and place of meeting
 - start on time
 - set parameters at beginning of meeting
 - ensure minutes are recorded and distributed
 - facilitate meeting:
 - encourage constructive contributions from participants
 - keep discussion on time and on topic
 - manage time with flexibility
 - summarize discussion at key points
 - adjourn meeting at scheduled time
 - ensure that follow-up is completed:
 - take decisions and action plans forward to those responsible
 - evaluate whether meeting was effective
 - identify ways to improve future meetings
-

34.06 Establish and conduct business relationships

Knowledge of:

- industry networking
- legal issues affecting agreements

Ability to:

- establish relationships in manner that promotes goodwill and trust between organization, customers and suppliers
 - build trust and respect through effective communication
 - maintain regular contact with customers and suppliers
 - confirm agreements in writing, using formal contracts where appropriate
 - gain appropriate approvals for formal agreements
 - identify need for and seek specialist advice when appropriate
 - honour agreements
-

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