

Comparative Analysis: The EMBOK Model Framework and the CTHRC Event Coordinator/Event Manager Occupational Standards

Section 1 Introduction

The Canadian Tourism Human Resource Council (CTHRC) Event Industry Standards

The occupational standards for the events industry in Canada were first developed as a single occupation, Special Events Coordinator, in 1990 by the Saskatchewan Tourism Education Council (STEC). In 1992, the western provinces of British Columbia, Alberta, Saskatchewan and Manitoba, joined forces to update the standards and ensure applicability within all four jurisdictions. At this time, the original set of standards was split into two occupations, Special Events Coordinator and Special Events Manager, to accommodate the range and scope of the competencies required to organize, implement and follow through on a large or small special event in an urban or rural location anywhere in Western Canada. These standards were updated and expanded again in 1996 when they were validated nationally, under the leadership of the Canadian Tourism Human Resource Council (CTHRC). Most recently, the national standards for the events industry in Canada were updated and renamed as Event Coordinator and Event Manager in 2004.

To date, the CTHRC has developed over 50 national occupational standards and 26 professional certification programs. In 2004, the Council launched the emerit brand for all their products – the occupational standards, professional certification, on-line and paper-based training materials and business resources – and created a system for recognizing the progressive stages towards achieving professional certification.

Occupational standards are the skills, knowledge, and attitudes needed to be considered competent in an occupation. Standards are created from a detailed occupational analysis which results in criteria-based performance and knowledge requirements for the job.

The key to developing realistic and meaningful occupational standards that reflect the requirements of the workplace is to invite industry experts who actually work in the occupation to participate in the process. Furthermore, the criteria-based performance and knowledge requirements for the job should be stated in concrete and specific terms. They must be meaningful, realistic, and easily understood by the various users.

The skills, knowledge and attitudes outlined in the standards must be measurable in a practical way and the assessment tools developed from the standards must be legally defensible.

Occupational standards contain 4 main components:

- *Major categories* – a major category identifies a general activity within the occupation. An occupation typically consists of five to ten major categories. Each major category contains one or more skill areas within the general activity.
- *Skills* – a skill identifies a general skill area within the general activity. Each skill contains one or more subskills.
- *Subskills (or standards)* – a subskill outlines a specific knowledge or performance skill within a general skill area. Each subskill contains a subskill statement and the details or content of the subskill.
- *Content or details* – the content or details of the subskill or standard outlines how the subskill can be achieved, i.e., the knowledge or performance required.

The standard also contains information about the frequency, relative importance, cognitive taxonomy, and level of difficulty of the tasks. This additional information provides the details needed by curriculum developers as well as workplace trainers and assessors.

- *Importance* – Importance refers to the significance and consequence of the skill (or cluster of skills) relative to the overall job.
- *Frequency* – Frequency refers to the rate of occurrence of the skill (or cluster of skills).
- *Cognitive Taxonomy* – Cognitive taxonomy is a system of classifying knowledge acquisition. The system is based on Benjamin Bloom's model which is widely accepted and used for curriculum development and to categorize test questions and prioritize training.
- *Difficulty* – Difficulty defines the level of effort, challenge, and complication associated with the performance of the skill (or cluster of skills).

The Event Management Body of Knowledge (EMBOK) Model

The Event Management Body of Knowledge (EMBOK) was conceived in 1999 by William J. O'Toole in his Masters Thesis at the University of Sydney, Australia. The premise of his concept began with a comparison of project management methodologies to event and festival management. Part of his data collection included a website where his work was posted to promote discussion and gather input from event managers.

His work coincided with the research of Julia Rutherford Silvers who was examining the scope of core competencies for event management. Their email correspondence in 2000 was the initial beginnings of EMBOK, which Julia launched as a project on her website in 2003.

At the first EMBOK Imbizo* in July 2004 in South Africa, Janet Landey, the founding president of the International Special Events Society (ISES) in South Africa, hosted a gathering of academics and practitioners; William O'Toole, Julia Rutherford Silvers, Dr. Joe Goldblatt, Glenn Bowdin, Dr. Kathy Nelson and Matthew Gonzalez, with whom she had worked with on numerous projects through ISES and the Institute of Event Management in Johannesburg. The group established an executive committee to explore the possibility of developing a conceptual framework for a common international event management body of knowledge that could be customized to meet the needs of various cultures, governments,

education programs, and organizations. Building on their own work, they started to develop a model that encompassed all the facets and dynamics of event management.

At the Second EMBOK Imbizo in Johannesburg South Africa, July 2005, the members of the International EMBOK Executive unveiled the International EMBOK Model. The model is a knowledge framework and descriptive summary of the scope and processes that are used in the management of events. Since its release, the model is being refined and validated by input from numerous industry and academic groups throughout the world.

Project Goals and Objectives

The goals for this project are to:

- compare the EMBOK framework and taxonomy to the CTHRC occupational standards for Event Coordinator and Event Manager;
- analyze how well or poorly the occupational standards fit into the EMBOK model; and
- make recommendations for improving the model.

Organization of this Paper

This project will review the components of the EMBOK model and the CTHRC occupational standards for Event Coordinator (EVC) and Event Manager (EVM). It will reorganize the EVC and EVM standards into the EMBOK framework to determine the extent of the fit and identify any gaps created in the model and in the standards. Lastly, it will raise questions and make recommendations for further research in the events industry.

Section One provides an introduction to the project and related background information.

Section Two describes the components of the EMBOK model.

Section Three outlines the assumptions and limitations for the comparative analysis.

Section Four describes the steps followed in the process of comparing the EMBOK model and the CTHRC standards.

Section Five presents the findings: Table 1 is the CTHRC standards organized according into the EMBOK framework and Table 2 identifies the gaps.

Section Six discusses the analysis and EMBOK model challenges.

Section Seven provides conclusions and makes recommendations for further research and/or improving the EMBOK model.

Section 2

The Event Management Body of Knowledge (EMBOK) Model

Components of the EMBOK Model

The following table from Julia Silver’s paper *Analysis of the International EMBOK Model as a Classification System*, presented at the 2007 Las Vegas International Hospitality and Convention Summit, identifies and classifies the components of the EMBOK model.

Table 1. Scope of the International EMBOK Model

| PROCESSES | | PHASES | | CORE VALUES | |
|-------------------------------|----------------------|-----------------------------|---------------------------|----------------------------|--|
| Assessment | | Initiation | | Creativity | |
| Selection | | Planning | | Strategic Thinking | |
| Monitoring | | Implementation | | Continuous Improvement | |
| Communication | | The Event | | Ethics | |
| Documentation | | Closure | | Integration | |
| KNOWLEDGE DOMAINS and CLASSES | | | | | |
| ADMINISTRATION | DESIGN | MARKETING | OPERATIONS | RISK | |
| Financial Management | Catering Design | Marketing Plan Management | Attendee Management | Compliance Management | |
| Human Resources Management | Content Design | Materials Management | Communications Management | Decision Management | |
| Information Management | Entertainment Design | Merchandise Management | Infrastructure Management | Emergency Management | |
| Procurement Management | Environment Design | Promotion Management | Logistics Management | Health & Safety Management | |
| Stakeholder Management | Production Design | Public Relations Management | Participant Management | Insurance Management | |
| Systems Management | Program Design | Sales Management | Site Management | Legal Management | |
| Time Management | Theme Design | Sponsorship Management | Technical Management | Security Management | |

Definitions of the Components

The following definitions of the EMBOK model components as stated in the Silvers article, *Updated EMBOK Structure as a Risk Management Framework for Events*, 28 December 2004, were used for this project.

The Processes

It is useful to begin with the process system, which includes assessment, selection, monitoring, communication, and documentation, because this process system and the terminology proposed is based on the widely-accepted process systems, particularly in the risk management field (DOD, 2002; PMI, 2000; Standards Australia, 1999 & others). It is a sequential and iterative system that promotes a dynamic approach to the changing nature of events and the risks that emerge. Risk management must be an on-going and dynamic activity because the risks surrounding meetings and events are constantly emerging, growing, subsiding, changing, and fluctuating in terms of urgency and priority. The risk management process must also be proactive and cyclical — facilitating communication, forecasting, and forward planning.

Assessment is defined as a two-step process of first **identification** then **analysis**. Identification is a discovery and definition process in which all the elements in each class or category are considered. The analytical process enhances predictive capabilities and facilitates proper prioritizing by qualifying and quantifying the characteristics of an element or identified risk.

Selection is the decision-making point, choosing the methods or tactics deemed most likely to achieve the goal or objective. Coupled with this decision are the assignment of resources, responsibility, and authority to carry out the tactic selected. The typical tactics in risk management include avoidance, reduction, transference, isolation, and retention.

Monitoring includes the regimented and planned tracking of the progress, status, or conditions of the tactic selected, including the performance of risk control actions, and developing further options and actions as needed by reiterating the assessment and selection processes.

Documentation includes the recording, reporting, maintaining, and archiving of assessments, analyses, response plans, monitoring and control results, and other records and documents, and provides valuable data and important evidence that leads to a robust risk management process.

Communication is a vital component of the process system, which includes timely information acquisition and distribution plus the appropriate consultation in decision-making. It is important to involve the appropriate constituents to achieve a comprehensive assessment and to foster acceptance of and support for the decisions made.

The Phases

The phases illustrate the sequential nature of event management, highlighting the criticality of time in any event project. The phases include initiation, planning, implementation, the event, and closure, and are derived from traditional project management terminology. Effective risk management relies on engagement at each juncture of this continuum throughout the life of the event project, from inception through completion.

Initiation is the phase in which research is conducted and the concept is defined and validated. This is when the scope and context is set, goals and objectives are defined, and the commitment of resources is established. This is also when a commitment to risk management must be instituted.

Planning is the phase wherein the requirements and specifications for the event project are determined, specifying the activities that will occur, how efforts will be organized, the resources that will be required, and the context, conditions, or assumptions that affect the decisions to be made. Risk planning provides the structure for making decisions based on realistic assumptions and accepted methods.

Implementation is the phase when all the goods and services are contracted and coordinated, synchronizing all the operational and logistical requirements of an event project. Risk management techniques are required during this phase to ensure the proper verification and control activities are employed.

The **Event** is set apart from Implementation as a distinct phase because a different and dynamic approach is required once the production begins. Whilst the above phases have the possibility of go/no-go decisions, once the event begins the only no-go possibility for the event is closure (or cancellation of specific elements or activities included in the event). Risk monitoring and control functions are critical during this phase so that hazards or incidents are responded to in a timely and effective manner.

Closure is the phase in which the event production is shut down, dismantled, and contractual obligations completed. This phase also includes the collection of feedback and the review of actions, activities, and decisions. This information is then evaluated to determine measurements (Return on Investment) or ratings against established criteria (performance critiques), to reveal impacts (economic, environmental, social, and cultural), and to record lessons learned that will facilitate the effective transfer of knowledge to the next event project.

The Core Values

The core values specify those principles that must be applied to all decisions regarding every element, phase, and process to ensure these decisions facilitate successful and sustainable outcomes. It is equally important to infuse all risk management decisions with these same fundamental values.

Creativity is regarded as essential for producing innovative and imaginative solutions and approaches to the challenges and opportunities presented throughout the management of an event project. Employing the qualities of inventiveness, inspiration, artistry, and resourcefulness are particularly important in the event industry.

Strategic Thinking is the ability to view and align an individual project's needs and methods within the entirety of an enterprise's short- and long-term goals and objectives in order to maintain a focus on the larger issues and impacts that should be factored into plans and tactics.

Continuous Improvement is a Total Quality philosophy expressed in the [Capability Maturity Model](#) that contends an optimized performing organization depends on the continuous and proactive improvement of all procedures, systems, and, it is thereby presumed, the results, rather than relying on reaction-driven planning.

Ethics encompass the judgments and choices made and the actions taken that reflect and enact beliefs of what is right versus wrong. Embedded in most codes of conduct for the event and other industries, these standards guide the decisions, negotiations, and activities in a way that maintains integrity, fairness, and decency.

Integration reflects the critical need to coordinate, synchronize, and merge the variety and multitude of interactions, dependencies, and interconnected elements included in an event project to ensure decisions incorporate all the factors influencing and influenced by those choices. (See also [Integration Management](#))

The Knowledge Domains and Functional Areas

Each domain represents an overarching area of activity, which may reflect an organizational structure or a modularized category for study and/or analysis. This structure facilitates the development of systems and the documentation required for the disciplined and thorough management of events and the risks surrounding them, as well as the formal, standardized, and predictable systems required for a mature and optimized performing organization capable of continuous diagnostic and prognostic improvement and effective knowledge transfer. But, of prime importance is the illustration of the full scope of the responsibilities, and therefore the risk management obligations, assigned to event organizers.

ADMINISTRATION

The Administration domain deals primarily with the proper allocation, direction, and control of the resources used in an event project. Since resources are finite by definition, it is imperative that they be acquired, developed, and utilized in the most efficient and effective manner to benefit the event project and limit its risk.

Financial Management is the development and use of budgets, proper costing and pricing strategies, standard accounting practices, and asset and cash flow management to achieve the financial goals of the event enterprise.

Human Resources Management encompasses the formulation of the appropriate organizational structure, policies, and procedures for the recruitment, orientation, training, compensation, motivation, supervision, and discipline of employees, contracted workers, and volunteers according to applicable employment and labor legalities to provide a suitable and diverse workforce to meet the needs of the event project.

Information Management includes the acquisition, distribution, control, and retention of information through the implementation of customary reporting, record keeping, and privacy and proprietary information protection procedures to ensure the necessary business intelligence and institutional memory is captured and preserved.

Procurement Management is comprised of the sourcing, selection, and contracting of the suppliers and vendors from whom goods and services will be procured using accurate solicitation materials and quality criterion, suitable documentation, change controls, and cost avoidance measures to ensure purchases will deliver cost value.

Stakeholder Management deals with the engagement of and interactions with the varied stakeholder constituencies of the event, including clients, officials, authorities, sponsors, participants, and providers,

to develop a mutual vision of and commitment to the requirements and desired outcomes for the event project.

Systems Management involves the implementation and coordination of the various accountability, database, knowledge management, and knowledge transfer systems using suitable technology applications and equipment to integrate the needs and assets of the event project and enterprise.

Time Management covers the processes required for the establishment and verification of timelines, production schedules, and schedule controls that will facilitate the activity architecture necessary to accomplish the tasks associated with the event project.

DESIGN

The Design domain focuses on the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions. The elements developed within each functional area combine to create the event experience encounter that will either be enjoyed or endured, with some options considered “risky” by their very nature or by design.

Catering Design Management includes the determination of suitable catering operations and the selection of the menus, quantities, and service styles to meet the food and beverage needs of the event, including the specific requirements associated with the serving of alcohol.

Content Design Management consists of the selection of the appropriate topics, formats, and presenters to achieve the communication objectives and educational obligations of the event project, incorporating the principles and dynamics of adult learning.

Entertainment Design Management encompasses the sourcing, selection, and control of suitable entertainment, ancillary programs, and recreational activities for the event project and coordinating the support requirements for the entertainers and activities in a manner that delivers the desired entertainment experience and that benefits the audience and organization.

Environment Design Management involves the creation or acquisition and arrangement of décor items, props, furnishings, decorative embellishments, and wayfinding and signage systems to enhance the attractiveness and functionality of learning, marketing, ceremonial, and entertainment environments.

Production Design Management deals with the incorporation, sourcing, and selection of the appropriate sound, lighting, visual projection, multimedia, special effect, and other theatrical elements and services to meet the communication objectives and create the desired impressions and ambiance of the event project.

Program Design Management concerns the formation and choreography of the agenda of activities, elements, exhibits, and amenities that shape the composition of the event experience to address the ceremonial, hospitality, and communication requirements of the goals and objectives of the event project.

Theme Design Management is the application of theme development principles and cultural iconography to communicate and integrate the purpose, message, image, and branding of the event project.

MARKETING

The Marketing domain addresses the functions that facilitate business development, cultivate economic and political support, and shape the image and value of the event project. The nature of the event as an “experience” necessitates a thorough understanding of the unique buyer-seller relationship associated with this intangible product.

Marketing Plan Management concerns the development and supervision of the overall marketing strategy and tactics to be employed, including target customer definition, acquisition and retention; the internal and external messages and mediums; and the maintenance of positive customer or guest relations to achieve the marketing aspirations for the event project and the hosting organization.

Materials Management includes the design, acquisition or production, and delivery of printed materials and other collateral materials that will be utilized to support the marketing and operational activities necessary for the event project.

Merchandise Management is the oversight of product development, manufacture, and distribution of retail merchandise associated with the event project to protect brand integrity and achieve profit objectives.

Promotion Management includes the procurement, orchestration, and organization of advertising campaigns, promotional events, cross promotion alliances, and contest or giveaway activities conducted to generate attention, interest, and demand for the event project.

Public Relations Management deals with the formulation and execution of tactics capable of garnering publicity coverage for an event project through the cultivation and conservation of beneficial relationships with the media, as well as preparing for the enhancement and control of the impressions, image, and issues surrounding the event project and enterprise, particularly in times of crisis or controversy.

Sales Management involves the establishment and supervision of procedures, platforms, and transaction processes for all the on-site, remote, and electronic sales activities connected with the event project, such as ticketing operations, concessions, and other retail endeavors, to achieve profit expectations.

Sponsorship Management is the identification, solicitation, securing, servicing, and retention of sponsors, donors, and philanthropic patrons through the proper valuation and delivery of suitable tangible and intangible benefits to provide financial and cost avoidance support for the event project.

OPERATIONS

The Operations domain concentrates on the people, products, and services that will be brought together on-site to produce the event project, as well as the roles, responsibilities, applications, and maneuvers associated with each. Impeccable coordination is required in order to manage this symphony (or cacophony) of logistical and functional requirements and expectations.

Attendee Management addresses the development and/or procurement of suitable admittance credentialing and control systems such as registration, ticketing, and housing, as well as the tactics for facilitating proper movement and pedestrian traffic flow of the event crowds.

Communications Management is the acquisition of the necessary equipment and development and implementation of the modes and protocols for on-site briefing and debriefing activities and information exchange with internal and external constituents of the event project, including the preparation and incorporation of applicable documentation and contact information into a comprehensive and readily accessible format.

Infrastructure Management concerns the confirmation, acquisition, or enhancement of inherent or imported equipment and services to ensure sufficient transportation systems, parking facilities, utilities, sanitation and waste management, and emergency response services are in place to meet the functional needs of the event project.

Logistics Management includes the analysis, sequencing, and supervision of the tasks and providers necessary for the move-in, installation, maintenance, disassembly, and move-out activities associated with the event project.

Participant Management encompasses the coordination and facilitation of the measures necessary to meet the procedural, practical, and hospitality requirements of those individuals having a direct and predetermined participatory role in the event project.

Site Management involves the sourcing, inspection, selection, and contracting of locations and facilities that will serve the needs of the event project, plus ensuring the proper development and layout of the site wherein the event project takes place.

Technical Management includes the acquisition of the necessary and appropriate staging and equipment, and supervision of its installation, operation, and attendant technician personnel, to ensure realization of the production plans of the event project within the physical constraints of the event site.

RISK

The Risk domain deals with the protective obligations, opportunities, and legalities traditionally associated with any enterprise, including an event project. These areas are inextricably linked with every choice made

and all activities conducted, and are increasingly mandated by stakeholders ranging from regulatory authorities to discriminating event consumers.

Compliance Management includes the acquisition of the necessary permissions and instruments that demonstrate adherence to all accessibility mandates, property rights requirements, and other applicable statutes, codes, and regulations to signify the event project is in compliance.

Decision Management encompasses the establishment of practical decision-making systems for the event project that include the accurate framing of decisions; the application of the pertinent resources, criteria, rules, and restraints; facilitating suitable deliberation and collaboration; and ensuring the proper authority and empowerment are granted.

Emergency Management is the identification and notification of the proper authorities, medical services, and other emergency responders, and the acquisition and/or development of plans and procedures suitable for responding properly to incidents, evacuations, crises, or disasters that may occur during the event project.

Health & Safety Management involves the establishment and implementation of fire and life safety, occupational safety, and crowd control policies and procedures that ensure the health and welfare of all individuals involved in or in attendance at the event project.

Insurance Management deals with ascertaining liability exposures and contractual requirements, sourcing suitable providers, and acquiring the proper insurance policies in order to maintain suitable loss prevention coverage and risk financing for the event project.

Legal Management is comprised of the negotiation and execution of the contracts and other legal documents associated with the acquisitions and endeavors of the event project, and oversight of the lawful design and implementation of the policies, procedures, and practices of the event organization and its representatives.

Security Management covers the sourcing, selection, and deployment of the personnel and equipment to be used to provide protective services and support for the event project, and the implementation and supervision of the appropriate command and control systems to ensure its efficacy.

The risk management tactics, tools and techniques employed to protect assets and individuals from loss, harm, death, or destruction and to protect an event from disruption, disgrace, or demise must be thoroughly and carefully considered from the inception through the production of the event project. This can be an awesome and intimidating responsibility, but by using the EMBOK for systematically conducting risk identification, analysis, response planning, control, and evaluation activities, this sometimes overwhelming duty will become manageable and instinctive. Its use will also facilitate the generation of the appropriate risk management plans, which articulate the procedures for proactively dealing with uncertainties and specify the resources and responsibilities for execution. This requires conscious preparation and forethought, two activities that, by their very application, serve to reduce risk, and creates an event organization that is risk resilient — knowing the risks and being prepared to compensate for and finance them.

Section 3

Assumptions and Limitations for the Comparative Analysis

Assumptions:

In order to carry out this analysis, the following assumptions have been made:

1. The definitions for the domains, classes, phases, processes and core values as set out in the paper titled *EMBOK Structures as a Risk Management framework for Events* by Julia Silvers, 28 December 2004, are the definitions used for this research.
2. The EMBOK model is a framework that can be applied to any event as well as other event-related profiles, such as the occupational standards for event occupations.
3. The EMBOK model is intended for an event that is going to take place. This does not include any activities conducted to determine the feasibility of an event.

Limitations:

- The primary technique for data collection was a literature review.
- The literature review was limited to the available documentation including the current versions of the unit standards and occupational standards and documents posted on the EMBOK, Julia Silvers and CTHRC websites.
- The CTHRC certification programs for Event Coordinator and Event Manager were not included in this comparative analysis.
- The various graphic representations of the EMBOK model were not included in this comparative analysis.
- Members of the research team have been involved with the development of occupational standards and certification programs for the events industry in Canada since 1990. As a result, they may have a better understanding of the organization and presentation of the Canadian standards than of the EMBOK Model.
- Members of the research team frequently interpreted the definitions of the EMBOK Model components differently from one another.

Section 4

Method of Comparison and Analysis

The Canadian Tourism Human Resource Council (CTHRC) occupational standards for Event Co-ordinator and Event Manager were reorganized to fit into International Event Management Body of Knowledge (EMBOK) framework.

The process was completed in stages. The first stage was to review the *EMBOK Model*, the components and their definitions. The document entitled *EMBOK Structures as a Risk Management Framework for Events* by Julia Silvers, December 2004, contains the definitions of all the components of the model including the domains, classes, phases, processes and core values.

The second stage was to create a table based on the five knowledge domains (Administration, Design, Marketing, Operations and Risk) and functional areas of the EMBOK model. Then the CTHRC occupational standards were placed into the appropriate knowledge domain and functional area.

The third stage was to assign the phases, processes and core values to each of the CTHRC standards in their place within the EMBOK framework. However, because the core values apply to all of the CTHRC standards, it was determined not to include them in the table to avoid the unnecessary repetition. The core values will be discussed in Section 6.

The final stage was to create a chart identifying the standards that did not fit into the EMBOK model framework.

Section 5 Findings

CTHRC Event Standards and the EMBOK Model

| DOMAINS AND CLASSES | CTHRC STANDARDS REFERENCE | PHASES | PROCESSES |
|---|--|---------------------------------------|---|
| ADMINISTRATION | | | |
| Deals with the proper allocation, direction, and control of the resources used in an event project. | | | |
| Financial Management is the development and use of budgets, proper costing and pricing strategies, standard accounting practices, and asset and cash flow management to achieve the financial goals of the event enterprise. | EVM A2.1 Develop budgets | Planning Implementation | Assessment Selection Documentation Communication |
| | EVM A2.2 Establish financial controls and procedures | Planning Implementation | Assessment Selection Monitoring Documentation |
| | EVM B1.8 Develop guidelines for box office and ticket operations | Planning Implementation | Assessment Selection Documentation |
| | EVC A3.1 Administer financial controls and procedures | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC A3.2 Implement budget | Implementation | Monitoring Documentation Communication |
| Human Resources Management encompasses the formulation of the appropriate organizational structure, policies, and procedures for the recruitment, orientation, training, compensation, motivation, supervision, and discipline of employees, contracted workers, and volunteers according to applicable employment and labour legalities to provide a suitable and diverse workforce to meet the needs of the event project. | EVM E1.1 Establish human resource plan | Planning Implementation Closure | Assessment Selection Monitoring Documentation |
| | EVM E1.2 Implement policies and procedures for human resource management | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC E1.1 Recruit staff and volunteers | Planning Implementation | Assessment Selection Documentation Communication |
| | EVC E1.2 Interview applicants | Planning Implementation | Selection Documentation |
| | EVC E1.3 Select final candidate | Implementation | Assessment Selection Documentation Communication |
| | EVC E2.1 conduct orientation | Implementation | Selection Monitoring Documentation Communication |
| | EVC E2.2 Provide training for staff and volunteers | Planning Implementation Closure | Assessment Selection Documentation Communication |
| | EVC E3.1 Supervise staff and volunteers | Implementation Closure | Selection Monitoring Documentation Communication |

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| | EVC E3.2 Promote teamwork | Implementation | Selection Monitoring Communication |
| | EVC E3.3 Motivate staff and volunteers | Implementation Closure | Selection Monitoring Communication |
| | EVC E3.4 Resolve conflicts | Planning Implementation Closure | Selection Documentation Communication |
| | EVC E3.5 Conduct performance reviews | Planning Implementation Closure | Selection Documentation Communication |
| Information Management includes the acquisition, distribution, control and retention of information through the implementation of customary reporting, record keeping, and privacy and proprietary information protection procedures to ensure the necessary business intelligence and institutional memory is captured and preserved. | EVM A1.4 Evaluate event | Initiation Planning Implementation Closure | Assessment Selection Documentation Communication |
| | EVM A1.5 Administer reporting and monitoring process | Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVM A2.2 Establish financial controls and procedures | Planning Implementation | Assessment Selection Monitoring Documentation |
| | EVM A4.1 Manage event sponsors/partnership process | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVM B1.7 develop system of accreditation | Planning Implementation | Assessment Selection Documentation Communication |
| | EVC A2.1 Implement reporting and monitoring process | Implementation Closure | Monitoring Documentation Communication |
| | EVC A2.2 Co-ordinate office administration | Planning Implementation | Selection Documentation |
| | EVC A2.3 Describe types of business documents | Initiation Planning Implementation Closure | Assessment Selection Documentation Communication |
| | EVC A3.1 Administer financial controls and procedures | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.21 Co-ordinate event evaluation | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| Procurement Management is comprised of sourcing, selection, and contracting of the suppliers and vendors from whom goods and services will be procured using accurate solicitation materials and quality criterion, suitable documentation, change controls, and cost avoidance measures to ensure purchases will | EVM A3.1 Source suppliers | Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVM A3.2 Negotiate contracts | Planning Implementation | Selection Documentation Communication |

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| deliver cost value. | | | |
| Stakeholder Management deals with the engagement of and interactions with the varied stakeholder constituencies of the event, including clients, officials, authorities, sponsors, participants, and providers, to develop a mutual vision of and commitment to the requirements and desired outcomes for the event project. | EVM A1.7 Oversee committees | Planning Implementation | Selection Communication |
| | EVM A4.1 Manage event sponsors/partnership process | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVM A4.2 Manage event donor process | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVM A4.3 Manage program funding process | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVC A1.3 Co-ordinate committees | Planning Implementation | Selection Monitoring Documentation Communication |
| Systems Management involves the implementation and coordination of the various accountability, database, knowledge management, and knowledge transfer systems using suitable technology applications and equipment to integrate the needs and assets of the event project and enterprise. | EVM A2.2 Establish financial controls and procedures | Planning Implementation | Assessment Selection Monitoring Documentation |
| | EVC A2.2 Co-ordinate office administration | Planning Implementation | Selection Documentation |
| | EVC A3.1 Administer financial controls and procedures | Planning Implementation | Selection Monitoring Documentation Communication |
| Time Management covers the processes required for the establishment and verification of timelines, production schedules, and schedule controls that will facilitate the activity architecture necessary to accomplish the tasks associated with the event project. | EVM A1.3 Develop critical path | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVM A1.5 Administer reporting and monitoring process | Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVC A1.2 Develop critical path for areas of responsibility | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVC A2.1 Implement reporting and monitoring process | Implementation Closure | Monitoring Documentation Communication |
| | EVC B1.19 Co-ordinate site set up | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.20 Co-ordinate site take-down | Planning Implementation Closure | Selection Monitoring Documentation Communication |

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| | EVC B1.21 Co-ordinate event evaluation | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| DOMAINS AND CLASSES | CTHRC STANDARDS REFERENCE | PHASES | PROCESSES |
| DESIGN | | | |
| Focuses on the artistic interpretation and expression of the goals and objectives of the event project and its experiential dimensions. | | | |
| Catering Design Management includes the determination of suitable catering operations and the selection of the menus, quantities, and service styles to meet the food and beverage needs of the event, including the specific requirements associated with the serving of alcohol. | EVM B1.5 Develop food and beverage operations plan | Initiation Planning | Selection Documentation Communication |
| | EVC B1.9 Arrange food and beverage services | Planning Implementation | Selection Documentation Communication |
| Content Design Management consists of the selection of the appropriate topics, formats, and presenters to achieve the communication objectives and educational obligations of the event project, incorporating the principles and dynamics of adult learning. | EVM B1.2 Plan event program | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| Entertainment Design Management encompasses the sourcing, selection, and control of suitable entertainment, ancillary programs, and recreational activities for the event project and coordinating the support requirements for the entertainers and activities in a manner that delivers the desired entertainment experience and that benefits the audience and organization. | EVM B1.2 Plan event program | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVM B1.4 Contract entertainment, activities, and attractions | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVC B1.4 Co-ordinate event performers | Planning Implementation | Monitoring Documentation Communication |
| | EVC B1.5 Co-ordinate décor design and special effects | Planning Implementation | Selection Monitoring Documentation |
| | EVC B1.6 Co-ordinate stage production | Planning Implementation | Selection Monitoring Documentation Communication |
| Environment Design Management involves the creation or acquisition and arrangement of décor items, props, furnishings, decorative embellishments, and wayfinding and signage systems to enhance the attractiveness and functionality of learning, marketing, ceremonial, and entertainment environments. | EVM B1.6 Develop event décor plan | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVC B1.5 Co-ordinate décor design and special effects | Planning Implementation | Selection Monitoring Documentation |
| Production Design Management deals with the incorporation, sourcing, and selection of the appropriate sound, lighting, visual | EVM B1.6 Develop event décor plan | Initiation Planning Implementation | Assessment Selection Documentation Communication |

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| projection, multimedia, special effect, and other theatrical elements and services to meet the communication objectives and create the desired impressions and ambiance of the event project. | EVC B1.5 Co-ordinate décor design and special effects | Planning Implementation | Selection Monitoring Documentation |
| | EVC B1.6 Co-ordinate stage production | Planning Implementation | Selection Monitoring Documentation Communication |
| Program Design Management concerns the formation and choreography of the agenda of activities, elements, exhibits, and amenities that shape the composition of the event experience to address the ceremonial, hospitality, and communication requirements of the goals and objectives of the event project. | EVM B1.1 Design event program | Initiation Planning | Assessment Selection Documentation |
| | EVM B1.2 Plan event program | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVM C2.10 Develop hospitality program | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| Theme Design Management is the application of theme development principles and cultural iconography to communicate and integrate the purpose, message, image, and branding of the event project. | EVM B1.1 Design event program | Initiation Planning | Assessment Selection Documentation |
| DOMAINS AND CLASSES | CTHRC STANDARDS REFERENCE | PHASES | PROCESSES |
| MARKETING | | | |
| Addresses the functions that facilitate business development, cultivate economic and political support, and shape the image and value of the event project. | | | |
| Marketing Plan Management concerns the development and supervision of the overall marketing strategy and tactics to be employed, including target customer definition, acquisition and retention; the internal and external messages and mediums; and the maintenance of positive customer or guest relations to achieve the marketing aspirations for the event project and the hosting organization. | EVM C1.1 Develop marketing plan | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVC C1.1 Fulfil marketing plan | Planning Implementation | Monitoring Documentation Communication |
| Materials Management includes the design, acquisition or production, and delivery of printed materials and other collateral materials that will be utilized to support the marketing and operational activities necessary for the event project. | EVM C2.1 Determine marketing material requirements | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVM C2.3 Develop souvenir program | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| Merchandise Management is the oversight of product development, manufacture, and distribution of retail merchandise associated with the event project to protect brand integrity and achieve profit objectives. | EVM C2.2 Develop merchandising plan | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |

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| <p>Promotion Management includes the procurement, orchestration, and organization of advertising campaigns, promotional events, cross promotion alliances, and contest or giveaway activities conducted to generate attention, interest, and demand for the event project.</p> | EVM C2.11 Develop advertising strategy | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation |
| | EVM C2.12 Submit feature articles for publication | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation |
| | EVC C1.2 Implement advertising strategy | Implementation Closure | Monitoring Documentation Communication |
| | EVC C1.3 Participate in trade and consumer shows | Implementation Closure | Monitoring Documentation Communication |
| | EVC C1.4 Set up contests | Planning Implementation Closure | Selection Monitoring Documentation Communication |
| <p>Public Relations Management deals with the formulation and execution of tactics capable of garnering publicity coverage for an event project through the cultivation and conservation of beneficial relationships with the media, as well as preparing for the enhancement and control of the impressions, image, and issues surrounding the event project and enterprise, particularly in times of crisis or controversy.</p> | B1.2 Follow guidelines to address environmental and social concerns | Planning Implementation | Selection Communication |
| | EVM C2.4 Develop public relations and publicity strategies | Initiation Planning | Assessment Selection |
| | EVM C2.5 Prepare media plan | Initiation Planning | Assessment Selection |
| | EVM C2.6 Issue media releases | Initiation Planning Implementation | Monitoring Documentation Communication |
| | EVM C2.7 Prepare media package | Planning Implementation | Selection |
| | EVM C2.8 Co-ordinate media conference | Initiation Planning Implementation | Selection Documentation Communication |
| | EVM C2.9 Arrange media blitz | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| <p>Sales Management involves the establishment and supervision of procedures, platforms, and transaction processes for all the on-site, remote, and electronic sales activities connected with the event project, such as ticketing operations, concessions, and other retail endeavors, to achieve profit expectations.</p> | EVM C2.2 Develop merchandising plan | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVM B1.8 Develop guidelines for box office and ticket operations | Planning implementation | Assessment Selection Documentation |
| | EVC B1.9 Arrange food and beverage services | Planning Implementation | Selection Documentation Communication |
| | EVC B1.12 Co-ordinate control points | Planning Implementation | Selection Monitoring Documentation Communication |
| <p>Sponsorship Management is the identification, solicitation, securing, servicing, and retention of sponsors, donors, and philanthropic patrons through the</p> | EVM A4.1 Manage event sponsors/partnership process | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |

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| proper valuation and delivery of suitable tangible and intangible benefits to provide financial and cost avoidance support for the event project. | EVM A4.2 Manage event donor process | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVM A4.3 Manage program funding process | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVM C2.10 Develop hospitality program | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVC C1.5 Organize sponsor and donor appreciation programs | Planning Implementation | Selection Documentation Communication |
| DOMAINS AND CLASSES | CTHRC STANDARDS REFERENCE | PHASES | PROCESSES |
| OPERATIONS | | | |
| Concentrates on the people, products, and services that will be brought together on-site to produce the event project, as well as the roles, responsibilities, applications, and manoeuvres associated with each. | | | |
| Attendee Management addresses the development and/or procurement of suitable admittance credentialing and control systems such as registration, ticketing, and housing, as well as the tactics for facilitating proper movement and pedestrian traffic flow of the event crowds. | EVM B1.7 Develop system of accreditation | Planning Implementation | Assessment Selection Documentation Communication |
| | EVM B1.8 Develop guidelines for box office and ticket operations | Planning implementation | Assessment Selection Documentation |
| | EVC B1.3 Co-ordinate accommodation | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.7 Co-ordinate seating arrangements | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.12 Co-ordinate control points | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.13 Co-ordinate registration area | Planning Implementation | Selection Monitoring Documentation Communication |
| Communications Management is the acquisition of the necessary equipment and development and implementation of the modes and protocols for on-site briefing and debriefing activities and information exchange with internal and external constituents of the event project, including the preparation and incorporation of applicable documentation and contact information into a comprehensive and readily accessible format. | EVM A1.5 Administer reporting and monitoring process | Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVC A2.1 implement reporting and monitoring process | Implementation Closure | Monitoring Documentation Communication |
| | EVC B1.18 Co-ordinate communication systems | Planning Implementation | Selection Monitoring Communication |
| Infrastructure Management concerns the confirmation, acquisition, or enhancement of | EVC B1.2 Follow guidelines to address environmental and social concerns | Planning Implementation | Selection Communication |

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| inherent or imported equipment and services to ensure sufficient transportation systems, parking facilities, utilities, sanitation and waste management, and emergency response services are in place to meet the functional needs of the event project. | EVC B1.10 Co-ordinate utilities | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.11 Co-ordinate waste management | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.15 Co-ordinate transportation systems | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.16 Co-ordinate parking | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.17 Co-ordinate security and emergency services | Planning Implementation | Selection Monitoring Documentation Communication |
| Logistics Management includes the analysis, sequencing, and supervision of the tasks and providers necessary for the move-in, installation, maintenance, disassembly, and move-out activities associated with the event project. | EVM B1.2 Plan event program | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVM B1.5 Develop food and beverage operations plan | Initiation Planning | Selection Documentation Communication |
| | EVC B1.6 Co-ordinate stage production | Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVC B1.9 Arrange food and beverage services | Planning Implementation | Selection Documentation Communication |
| | EVC B1.11 Co-ordinate waste management | Planning Implementation Event | Selection Monitoring Documentation Communication |
| | EVC B1.19 Co-ordinate site set up | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.20 Co-ordinate site take-down | Planning Implementation Closure | Selection Monitoring Documentation Communication |
| Participant Management encompasses the coordination and facilitation of the measures necessary to meet the procedural, practical, and hospitality requirements of those individuals having a direct and predetermined participatory role in the event project. | EVC B1.8 Co-ordinate services for people with special needs | Planning Implementation Event | Assessment Selection Monitoring Documentation Communication |
| | EVC B1.13 Co-ordinate registration area | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.14 Co-ordinate information area | Planning Implementation | Selection Documentation Communication |

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| Site Management involves the sourcing, inspection, selection, and contracting of locations and facilities that will serve the needs of the event project, plus ensuring the proper development and layout of the site wherein the event project takes place. | EVM B1.3 Select site | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVC B1.1 Develop site plan | Planning | Selection Documentation Communication |
| Technical Management includes the acquisition of the necessary and appropriate staging and equipment, and supervision of its installation, operation, and attendant technician personnel, to ensure realization of the production plans of the event project within the physical constraints of the event site. | EVC B1.1 Develop site plan | Planning | Selection Documentation Communication |
| | EVC B1.6 Co-ordinate stage production | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.19 Co-ordinate site set up | Planning Implementation | Selection Monitoring Documentation Communication |
| DOMAINS AND CLASSES | CTHRC STANDARDS REFERENCE | PHASES | PROCESSES |
| RISK Deals with the protective obligations, opportunities, and legalities traditionally associated with any enterprise, including an event project. | | | |
| Compliance Management includes the acquisition of the necessary permissions and instruments that demonstrate adherence to all accessibility mandates, property rights requirements, and other applicable statutes, codes, and regulations to signify the event project is in compliance. | EVM D1.3 Comply with legislation | Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVC D1.1 Comply with legislation | Implementation | Selection Monitoring Communication |
| Decision Management encompasses the establishment of practical decision-making systems for the event project that include the accurate framing of decisions; the application of the pertinent resources, criteria, rules, and restraints; facilitating suitable deliberation and collaboration; and ensuring the proper authority and empowerment are granted. | EVM A1.3 Develop critical path Initiation Planning | Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVM D1.2 Develop contingency plan | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVC A1.2 Develop critical path for areas of responsibility | Initiation Planning Implementation Closure | Assessment Selection Monitoring Documentation Communication |
| | EVC A1.3 Co-ordinate committees | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC D1.3 Implement contingency plan | Implementation | Selection Monitoring Documentation Communication |
| Emergency Management is the identification and notification of the proper authorities, medical services, and other emergency responders, and the acquisition | EVM D1.1 Develop event risk management plan | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |

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| and/or development of plans and procedures suitable for responding properly to incidents, evacuations, crises, or disasters that may occur during the event project. | EVC B1.17 Co-ordinate security and emergency services | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC D1.2 Adhere to risk management plan | Implementation | Selection Monitoring Communication |
| Health & Safety Management involves the establishment and implementation of fire and life safety, occupational safety, and crowd control policies and procedures that ensure the health and welfare of all individuals involved in or in attendance at the event project. | EVM B1.3 Select site | Initiation Planning Implementation | Assessment Selection Documentation Communication |
| | EVM B1.7 Develop system of accreditation | Planning Implementation | Assessment Selection Documentation Communication |
| | EVC B1.1 Develop site plan | Planning | Selection Documentation Communication |
| | EVC B1.12 Co-ordinate control points | Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVC B1.17 Co-ordinate security and emergency services | Planning Implementation | Selection Monitoring Documentation Communication |
| Insurance Management deals with ascertaining liability exposures and contractual requirements, sourcing suitable providers, and acquiring the proper insurance policies in order to maintain suitable loss prevention coverage and risk financing for the event project. | EVM D1.1 Develop event risk management plan | Initiation Planning Implementation | Assessment Selection Monitoring Documentation Communication |
| | EVC D1.2 Adhere to risk management plan | Implementation | Selection Monitoring Communication |
| Legal Management is comprised of the negotiation and execution of the contracts and other legal documents associated with the acquisitions and endeavors of the event project, and oversight of the lawful design and implementation of the policies, procedures, and practices of the event organization and its representatives. | EVM A1.6 Establish event policies and procedures | Planning Implementation | Assessment Selection Documentation Communication |
| | EVM A3.2 Negotiate contracts | Planning Implementation | Selection Documentation Communication |
| | EVC A2.4 Comply with contracts | Implementation | Monitoring Documentation Communication |
| | EVC A2.5 Follow steps for negotiation | Planning Implementation | Selection Documentation Communication |
| Security Management covers the sourcing, selection, and deployment of the personnel and equipment to be used to provide protective services and support for the event project, and the implementation and supervision of the appropriate command and control systems to ensure its efficacy. | EVC B1.12 Co-ordinate control points | Planning Implementation | Selection Monitoring Documentation Communication |
| | EVC B1.17 Co-ordinate security and emergency services | Planning Implementation | Selection Monitoring Documentation Communication |

Gap Analysis Chart

| EVENT COORDINATOR | | |
|---|--|--|
| CTHRC Standard | EMBOK Knowledge Domains | EMBOK Functional Areas |
| EVC A1.1 Fulfill business plan | | |
| EVC A1.2 Develop critical path for areas of responsibility | Administration Risk | Time Management Decision Management |
| EVC A1.3 Co-ordinate committees | Administration Risk | Stakeholder Management Decision Management |
| EVC A2.1 Implement reporting and monitoring process | Administration Administration Operations | Information Management Time Management Communications Management |
| EVC A2.2 Co-ordinate office administration | Administration | Information Management Systems Management |
| EVC A2.3 Describe types of business documents | Administration | Information Management |
| EVC A2.4 Comply with contracts | Risk | Legal Management |
| EVC A2.5 Follow steps for negotiation | Risk | Legal Management |
| EVC A3.1 Administer financial controls and procedures | Administration | Financial Management Information Management Systems Management |
| EVC A3.2 Implement budget | Administration | Financial Management |
| EVC B1.1 Develop site plan | Operations Operations Operations | Site Management Technical Management Health and Safety Management |
| EVC B1.2 Follow guidelines to address environmental and social concerns | Marketing Operations | Public Relations Management Infrastructure Management |
| EVC B1.3 Co-ordinate accommodation | Operations | Attendee Management Participant Management |
| EVC B1.4 Co-ordinate event performers | Design | Entertainment Design Management |
| EVC B1.5 Co-ordinate décor design and special effects | Design | Entertainment Design Management Environment Design Management Production Design Management |
| EVC B1.6 Co-ordinate stage production | Design Design Operations | Entertainment Design Management Production Design Management Logistics Management Technical Management |
| EVC B1.7 Co-ordinate seating arrangements | Operations | Attendee Management |
| EVC B1.8 Co-ordinate services for people with special needs | Operations | Participant Management |
| EVC B1.9 Arrange food and beverage services | Marketing Design Operations | Sales Management Catering Design Management Logistics Management |
| EVC B1.10 Co-ordinate utilities | Operations | Infrastructure Management |
| EVC B1.11 Co-ordinate waste management | Operations | Infrastructure Management Logistics Management |
| EVC B1.12 Co-ordinate control points | Marketing Operations Risk Risk | Sales Management Attendee Management Health and Safety Management Security Management |
| EVC B1.13 Co-ordinate registration area | Operations | Attendee Management Participant Management |
| EVC B1.14 Co-ordinate information area | Operations | Participant Management |
| EVC B1.15 Co-ordinate transportation systems | Operations | Infrastructure Management |
| EVC B1.16 Co-ordinate parking | Operations | Infrastructure Management |

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| EVC B1.17 Co-ordinate security and emergency services | Operations Risk Risk | Infrastructure Management Emergency Management Health and Safety Management Security Management |
| EVC B1.18 Co-ordinate communication systems | Operations | Communications Management |
| EVC B1.19 Co-ordinate site set up | Administration Operations | Time Management Logistics Management Technical Management |
| EVC B1.20 Co-ordinate site take-down | Administration Operations | Time Management Logistics Management |
| EVC B1.21 Co-ordinate event evaluation | Administration | Information Management Time Management |
| EVC C1.1 Fulfill marketing plan | Marketing | Marketing Plan Management |
| EVC C1.2 Implement advertising strategy | Marketing | Promotion Management |
| EVC C1.3 Participate in trade and consumer shows | Marketing | Promotion Management |
| EVC C1.4 Set up contests | Marketing | Promotion Management |
| EVC C1.5 Organize sponsor and donor appreciation programs | Marketing | Sponsorship Management |
| EVC D1.1 Comply with legislation | Risk | Compliance Management |
| EVC D1.2 Adhere to risk management plan | Risk | Emergency Management Insurance Management |
| EVC D1.3 Implement contingency plan | Risk | Decision Management |
| EVC E1.1 Recruit staff and volunteers | Administration | Human Resource Management |
| EVC E1.2 Interview applicants | Administration | Human Resource Management |
| EVC E1.3 Select final candidate | Administration | Human Resource Management |
| EVC E2.1 Conduct orientation | Administration | Human Resource Management |
| EVC E2.2 Provide training for staff and volunteers | Administration | Human Resource Management |
| EVC E3.1 Supervise staff and volunteers | Administration | Human Resource Management |
| EVC E3.2 Promote teamwork | Administration | Human Resource Management |
| EVC E3.3 Motivate staff and volunteers | Administration | Human Resource Management |
| EVC E3.4 Resolve conflicts | Administration | Human Resource Management |
| EVC E3.5 Conduct performance reviews | Administration | Human Resource Management |
| EVC F1.1 Be professional | | |
| EVC F1.2 Demonstrate leadership | | |
| EVC F1.3 Manage multiple priorities | | |
| EVC F1.4 Solve problems | | |
| EVC F2.1 Define communication | | |
| EVC F2.2 Speak effectively | | |
| EVC F2.3 Communicate in writing | | |
| EVC F2.4 Make effective presentations | | |
| EVENT MANAGER | | |
| EVM A1.1 Research event | | |
| EVM A1.2 Develop business plan | | |
| EVM A1.3 Develop critical path | Administration Risk | Time Management Decision Management |
| EVM A1.4 Evaluate event | Administration | Information Management |
| EVM A1.5 Administer reporting and monitoring process | Administration Administration Operations | Information Management Time Management Communications Management |
| EVM A1.6 Establish event policies and procedures | Risk | Legal Management |
| EVM A1.7 Oversee committees | Administration | Stakeholder Management |
| EVM A2.1 Develop budgets | Administration | Financial Management |
| EVM A2.2 Establish financial controls and procedures | Administration | Financial Management Information Management Systems Management |
| EVM A3.1 Source suppliers | Administration | Procurement Management |
| EVM A3.2 Negotiate contracts | Administration Risk | Procurement Management Legal Management |
| EVM A4.1 Manage event sponsor/partnership process | Administration Marketing | Information Management Stakeholder Management Sponsorship Management |

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| EVM A4.2 Manage event donor process | Administration Marketing | Stakeholder Management Sponsorship Management |
| EVM A4.3 Manage program funding process | Administration Marketing | Stakeholder Management Sponsorship Management |
| EVM B1.1 Design event program | Design Design | Program Design Management Theme Design Management |
| EVM B1.2 Plan event program | Design Design Design Operations | Content Design Management Entertainment Design Management Program Design Management Logistics Management |
| EVM B1.3 Select site | Operations Risk | Site Management Health and Safety Management |
| EVM B1.4 Contract entertainment, activities, and attractions | Design | Entertainment Design Management |
| EVM B1.5 Develop food and beverage operations plan | Design Operations | Catering Design Management Logistics Management |
| EVM B1.6 Develop event décor plan | Design | Environment Design Management Production Design Management |
| EVM B1.7 Develop system of accreditation | Administration Operations Risk | Information Management Attendee Management Health and Safety Management |
| EVM B1.8 Develop guidelines for box office and ticket operations | Administration Marketing Operations | Financial Management Sales Management Attendee Management |
| EVM C1.1 Develop marketing plan | Marketing | Marketing Plan Management |
| EVM C2.1 Determine marketing material requirements | Marketing | Materials Management |
| EVM C2.2 Develop merchandising plan | Marketing | Merchandise Management Sales Management |
| EVM C2.3 Develop souvenir programme | Marketing | Materials Management |
| EVM C2.4 Develop public relations and publicity strategies | Marketing | Public Relations Management |
| EVM C2.5 Prepare media plan | Marketing | Public Relations Management |
| EVM C2.6 Issue media releases | Marketing | Public Relations Management |
| EVM C2.7 Prepare media package | Marketing | Public Relations Management |
| EVM C2.8 Co-ordinate media conference | Marketing | Public Relations Management |
| EVM C2.9 Arrange media blitz | Marketing | Public Relations Management |
| EVM C2.10 Develop hospitality program on | Design Marketing | Program Design Management Sponsorship Management |
| EVM C2.11 Develop advertising strategy | Marketing | Promotion Management |
| EVM C2.12 Submit feature articles for publication | Marketing | Promotion Management |
| EVM D1.1 Develop event risk management plan | Risk | Emergency Management Insurance Management |
| EVM D1.2 Develop contingency plan | Risk | Decision Management |
| EVM D1.3 Comply with legislation | Risk | Compliance Management |
| EVM E1.1 Establish human resources plan | Administration | Human Resource Management |
| EVM E1.2 Implement policies and procedures for human resource management | Administration | Human Resource Management |
| EVM F1.1 Be professional | | |
| EVM F1.2 Demonstrate leadership | | |
| EVM F1.3 Manage multiple priorities | | |
| EVM F1.4 Solve problems | | |
| EVM F2.1 Define communication | | |
| EVM F2.2 Speak effectively | | |
| EVM F2.3 Communicate in writing | | |
| EVM F2.4 Make effective presentations | | |

Section 6

Discussion of Analysis and Challenges

This section will discuss the findings of the comparative analysis and identify challenges with the EMBOK model.

On the whole, the CTHRC standards fit into the EMBOK framework fairly well, with some exceptions. The following standards cannot be assigned to any functional areas within the Knowledge Domains:

EVC A1.1 Fulfill business plan
EVM A1.1 Research event
EVM A1.2 Develop business plan
EVC/EVM F1.1 Be professional
EVC/EVM F1.2 Demonstrate leadership
EVC/EVM F1.3 Manage multiple priorities
EVC/EVM F1.4 Solve problems
EVC/EVM F2.1 Define communication
EVC/EVM F2.2 Speak effectively
EVC/EVM F2.3 Communicate in writing
EVC/EVM F2.4 Make effective presentations

The Standards that do not fit into EMBOK

- EVC A1.1 Fulfill business plan aligns with the Core Value, *Strategic Thinking*, in that it ensures that the activities that need to take place coincide with the overriding goals, objectives and mission statement of the event. This standard is very broad and could fit into every knowledge domain and functional area of the EMBOK model.
- EVM A1.1 Research event and EVM A1.2 Develop business plan are either outside the scope of the EMBOK model or they belong in the *Assessment Process*, the *Initiation* and *Planning* Phases as well as the Core Value *Strategic Thinking*.
- The professionalism and communication standards are personal qualities and interpersonal skills that enable an individual to work within the EMBOK model framework. They could also fit into every knowledge domain and functional area of the EMBOK model.

EMBOK Model Challenges – Core Values

The EMBOK Core Values include Creativity, Strategic Thinking, Continuous Improvement, Ethics and Integration. The definition outlines the importance of applying the values or principles to all decisions in every element, phase and process to ensure successful and sustainable outcomes. There are corresponding CTHRC standards that address these core values and can be applied in much the same way. *See Table 1.*

Table 1. Core Values and Corresponding CTHRC Content

| Core Values | CTHRC standards content |
|------------------------|--|
| Creativity | EVC/EVM F1.4 solve problems EVC/EVM F1.1 be professional |
| Strategic Thinking | EVC A1.1 fulfil business plan EVC/EVM F1.1 be professional |
| Continuous Improvement | EVM/EVC F1.1 be professional EVM A1.4 evaluate event EVC B1.21 coordinate event evaluation |
| Ethics | EVC/EVM F1.1 be professional |
| Integration | EVM A1.3 develop critical path EVC A1.2 develop critical path for areas of responsibility EVC/EVM F1.1 be professional |

Continuous Improvement is an outcome of the process of evaluation rather than a core value. It consists of measuring performance, gathering feedback, identifying and addressing issues for the purpose of on-going improvement. Evaluation is a process that requires information management structures and would belong in the Administration Domain.

The remaining core values, creativity, strategic thinking, ethics and integration, by definition, apply to all decisions within the event management framework. Decision making is the focus of the Selection process which is guided by these core values. Therefore, it makes sense to incorporate these core values (creativity, strategic thinking, ethics and integration) into the definition of the Selection process.

EMBOK Model Challenges – Processes

The EMBOK Model Process system includes *Assessment, Selection, Monitoring, Documentation* and *Communication*. This is a sequential system reflecting the changing nature of event management.

The definitions of the Processes need to be clarified. For example, there is not enough information in the definitions to differentiate between *Assessment* and *Selection*. They seem to be two stages of the decision-making process. In the event context, is *Assessment* carried out for purposes other than decision-making and does *Selection* take place without assessing criteria? Either combine *Assessment* and *Selection* and rename it *Decision-Making* or clarify the definitions and differentiate them from one another.

Documentation is not a stand alone Process but rather a supporting activity for all of the other Processes, including *Assessment, Selection, Monitoring* and *Communication*. It should be incorporated into the other Processes.

EMBOK Model Challenges – Phases

The EMBOK model Phases includes *Initiation, Planning, Implementation, the Event* and *Closure*. They are intended to highlight the criticality of time in an event project.

The definitions of the Phases need to be clarified. For example, the definition of *Initiation* states that it is the Phase where “research is conducted and the concept is defined and validated.” It is not clear if this applies to the event as a whole or if it applies to each Knowledge Domain and Functional Area. Also, the *Implementation* Phase does not clearly specify a time frame since many activities or services can be implemented during an event. Therefore, it is often difficult to differentiate between the two Phases *Implementation* and *the Event*.

The Event Phase is focused on activities related to monitoring for risks. The definition of this Phase does not specify what is happening at this time unlike the definitions of the other Phases. This Phase does not apply to occupational standards in the same way it applies to an event. For example, every Functional Area in the EMBOK model goes through *the Event* Phase. The event coordinator or event manager sets up the Functional Areas in advance and during *the Event* may be monitoring or problem solving or managing multiple priorities.

The definition for *Closure* begins with a clear time frame but then focuses almost exclusively on evaluation. Evaluation should be a Process, not a Phase, that can span several time periods and can use different methods and tactics for collecting information and measuring results.

EMBOK Model Challenges – Functional Areas

Some of the CTHRC standards were referenced to more than one Functional Area which may indicate an overlap in the scope of the Functional Areas. For example, compare Stakeholder Management (in Administration) to Sponsorship Management (in Marketing). Also compare Information Management in Administration to Communication Management in Operations.

EMBOK Model Challenges – Overall

Finally, the EMBOK model was relatively easy to use for the purposes of this comparative analysis, however, the range in possible interpretations for the definitions of the EMBOK components complicated the research and analysis project. Simplifying the language used to describe the model will make it easier to understand.

Section 7

Conclusions and Recommendations

This section will summarize the comparative analysis and make recommendations for improvements to the EMBOK model.

The EMBOK framework accommodates the CTHRC occupational standards for Event Coordinator and Event Manager fairly well given that the EMBOK model is an event management framework and the occupational standards describe the skills, knowledge and attitudes of EVCs and EVMs. The occupational standards addressed all of the functional areas identified in the EMBOK model.

However the EMBOK model did not address all of the occupational standards because they were either outside the scope of the model or because they were interpersonal skills.

Some aspects of the EMBOK model were difficult to apply because the definitions were not clear. This was the case most often with the Phases and Processes.

There were also some instances of overlap in the functional areas but this may be indicative of their inter-relatedness rather than unnecessary repetition.

Recommendations

- Incorporate the Core Values of *Creativity, Strategic Thinking, Ethics* and *Integration* into the *Selection* Process.
- Change *Continuous Improvement* into a new Process, called *Evaluation*.
- Revise the definitions to better differentiate between the *Assessment* and *Selection* Processes or combine them and rename them *Decision-Making*.
- Remove the *Documentation* Process.
- Clarify the definitions of *Initiation* and *the Event* Phases.
- Clarify the timeframe intended for the *Implementation* Phase. This may require renaming the Phase to be more time specific to pre-event activities.
- Remove the discussion of evaluation from the definition of *Closure* and expand the definition to include other post-event activities.

Section 8

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