

# Unit 18: Managing a Business Event

<b>Unit code:</b>	<b>F/502/5449</b>
<b>QCF Level 3:</b>	<b>BTEC National</b>
<b>Credit value:</b>	<b>10</b>
<b>Guided learning hours:</b>	<b>60</b>

## ● Aim and purpose

The aim of this unit is to develop learners' skills in and knowledge of organising and coordinating a business event. Learners will do this through planning, providing support, and follow-up activities involved in running a business event.

## ● Unit introduction

Managing a business event is an activity that many people working in a support role will be involved in. It is a challenging activity which can include organising and co-ordinating resources and arrangements for a variety of events, from arranging meetings, product launches, exhibitions and promotions to organising a full-scale conference.

This practical unit focuses on large and complex business events rather than informal small ones, and will enable learners to develop knowledge and skills to manage different types of business events. The tasks of an event organiser include forward planning to organise a suitable venue, arranging attendance and accommodation for delegates, organising equipment and refreshments, producing delegate packs and papers, liaising with others, keeping records and managing a budget. Excellent communication and interpersonal skills are therefore essential to undertake this range of activities effectively and efficiently.

Managing a business event also involves agreements with suppliers of equipment and facilities. An understanding of the law of contract and the major consumer protection laws is essential to ensure that both legal and organisational requirements are met. Health and safety issues need to be considered, whether the event is held on the organisation's premises or elsewhere. However well planned an event is, problems can occur and need to be resolved, such as late or non-delivery of resources or responding to delegates' needs throughout the event. At the end of the event, a debriefing session provides an opportunity to reflect on the event's success and lessons learned for improving the management of future business events.

It is expected that, as this unit has a practical focus, learners will need to hold an event to enable all the learning outcomes to be completed satisfactorily.

## ● Learning outcomes

**On completion of this unit a learner should:**

- 1 Understand the role of an event organiser
- 2 Be able to plan a business event
- 3 Be able to run a business event
- 4 Be able to follow up after a business event.

# Unit content

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## 1 Understand the role of an event organiser

*Role of event organiser:* organising – venue, location, catering; planning and reserving facilities; setting up programme; preparing and distributing supporting documents; organisational procedures; current legal requirements; contracts, agreements, consumer protection; limits of role

*Skills:* communication and interpersonal skills; time management; problem solving; negotiating; planning; resource management; monitoring; evaluating

## 2 Be able to plan a business event

*Types of event:* routine/non-routine, formal/informal eg meetings, staff training sessions, exhibitions, receptions, conferences, trade fair stands

*Prior arrangements:* clarifying purpose; brief – type of event, size, target audience, numbers, responsibilities, procedures; budget and cost analysis; distribution supporting documents/files eg agenda; relevant meeting papers; consultation and planning; clear and accurate communication eg joining instructions, dissemination of alterations and changes in arrangements; organising appropriate venues

*Venue:* location, size, layout; time required for advance notice or bookings; assess facilities, eg parking, catering access; number and type of delegates, special requirements; venue checklist

*Resources:* room eg size, layout (boardroom, theatre); equipment eg overhead projector, flip chart, paper; display stand, literature for stand; refreshments; delivery of materials

*Scheduling:* software eg Microsoft Outlook; liaison role eg via updating diaries, resolving availability changes; care/experience in allocating times eg travel, rest, preparation; organisational policies eg booking travel; confirming plans in good time eg travel documentation; booking flights and accommodation; checking return journeys; related problems eg language difficulties

## 3 Be able to run a business event

*Types of activity:* eg presentations, group activities or workshops, manning stands, displays, screenings, minute/note taking

*Health, safety and security:* venue emergency procedures; housekeeping arrangements; security of materials and equipment; confidentiality of information and communication

*Event support:* eg note taking, ensuring delegates have right papers, ensuring delegates are aware of location of conference rooms and facilities, recording attendance and cancellations

*Trouble-shooting:* liaison with delegates; potential revision/rearrangement of event outcomes; arising issues eg non-attendance of delegates, last-minute photocopying, inadequate room or facilities, non-delivery of resources

## 4 Be able to follow up after a business event

*After the event:* vacating the event eg leaving venue clean and tidy; returning or securing equipment; reconciliation of accounts to budget

*Evaluation:* eg debrief, delegate questionnaire, event problems, solutions, lessons learned

*Circulation of materials after event:* eg meeting minutes, evaluation forms/questionnaires, post-event papers, circulation lists

## Assessment and grading criteria

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

Assessment and grading criteria		
To achieve a pass grade the evidence must show that the learner is able to:	To achieve a merit grade the evidence must show that, in addition to the pass criteria, the learner is able to:	To achieve a distinction grade the evidence must show that, in addition to the pass and merit criteria, the learner is able to:
<b>P1</b> describe the skills required of an event organiser [IE]	<b>M1</b> assess the importance of meeting organisational and legal requirements when planning a business event	<b>D1</b> evaluate the management of a business event making recommendations for future improvements
<b>P2</b> explain the role of an event organiser [IE]		
<b>P3</b> prepare a plan for a business event [TW]		
<b>P4</b> arrange and organise a venue for a business event, ensuring health and safety requirements are met [SM, EP]	<b>M2</b> analyse the arrangements made by an event organiser to plan a business event	
<b>P5</b> provide support for the running of an event		
<b>P6</b> produce guidelines for dealing with problems [IE]		
<b>P7</b> carry out follow-up activities after a business event	<b>M3</b> evaluate how a business event can inform future planning.	
<b>P8</b> review the success of the business event. [RL]		<b>D2</b> evaluate feedback from delegates participating in the event.

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

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

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## Delivery

As an introduction to the unit, learners will need to understand the range of different types of business event. Discussion groups could draw on learners' own experiences of events they have attended in the past year and they could rate how successful these were in terms of organisation, highlighting what could have been done better. It should be noted that this unit focuses on important and complex business events, in order for learners to acquire the appropriate range of skills and knowledge.

Delivery of this unit will focus on learners acquiring the practical skills involved in the organisation and coordination of an event. Discussion groups can be used for learners to explore and share experiences of the different types and purposes of events such as meetings, conferences, exhibitions, receptions and trade fair stands. Learners need to know the importance of forward planning and keeping accurate records when organising an event. The range of tasks involved in planning an event are varied (for example selecting appropriate venues, identifying resources needed to support the event, budgetary responsibilities, arranging travel and accommodation for participants, producing an agenda) and all of these require communication with relevant parties about progress. Role-play scenarios and in-tray exercises would be useful to help reinforce learning, and tutors can provide example checklists. The use of guest speakers, such as an event organiser, and visits to different types of event (if feasible) are to be encouraged so learners gain first-hand experience. It would be worth tutors providing a scenario for small groups to practise planning activities before managing their own event.

Knowledge and awareness of health, safety and security requirements are essential for organising events, and learners should examine the requirements for events organised both on and off an organisation's premises. This must include security of material, equipment and information, as well as ensuring that participants with special requirements are catered for.

The administration roles will vary, depending on the type of event,. They can include taking notes for the minutes of a meeting, staffing a stand at an exhibition, checking arrangements, testing equipment, and ensuring any documentation is prepared. Tutors should introduce learners to the wide range of activities and administrative tasks they would carry out highlighting the types of problems that could occur. Again, guest speakers would raise awareness of this and provide examples of dealing with problems. Likewise, attending an externally-organised event before planning and staging an event for this unit will provide a focus for discussion, analysis and evaluation.

There are specific points to observe when clearing and vacating an event, such as ensuring the venue is clean and tidy, equipment has been returned and any relevant documentation is circulated. The success of the event must be evaluated in order that any lessons can be learned and actioned for the future. Learners can gather data using different methods, such as questionnaires or phone calls, collate this data and identify any problems. They can then make recommendations for future actions.

Learners will need opportunities to develop their skills and knowledge of organising and coordinating an event. If it is not possible for them to carry this out in the workplace, tutors should identify suitable learning opportunities. For example, they could help organise a parents' evening for prospective new learners, a board of governors meeting, or a visit to an exhibition. It is important that they keep records of all their activities and evaluate the success of the event.

## Outline learning plan

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

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

Topic and suggested assignments/activities and/assessment
Introduction to unit and structure of the programme/assignments
Speaker/visit to events
Theory components of the role and skills of an event organiser
Research and group work on types of events
<b>Assignment 1: The Event Organiser</b>
Theory components of planning an event
Research and group work tasks involved in planning an event
<b>Assignment 2: Planning the Event</b>
Theory components of coordinating activities during an event
Research and group work administrative tasks and types of problems that arise
<b>Assignment 3: Running the Event</b>
Theory components of clearing and vacating an event
Analyse the success of an event
Tutorial support
<b>Assignment 4: Reviewing the Success of the Event</b>
Supervised assignment work
Non-supervised study time and completion of assignments

## Assessment

Learners can provide evidence to show how they have organised and co-ordinated a business event. These can be in the form of witness testimonies and observations by the tutor and supplemented by a logbook kept by the learner.

For P1 and P2, learners must describe the role of an event organiser and the skills needed for the successful planning and running of a business event. Learners must include an overview of the importance of following organisational and legal procedures when organising the event. This can be achieved using examples relating to a business event that learners have organised or attended. Evidence can be in the form of a report or presentation.

For P3 and P4, learners must provide evidence of planning the business event which includes tasks such as booking a venue, identifying resources, arranging travel and accommodation, organising materials, health, safety and security of the venue and equipment, etc. The plan should identify estimated timescales and budget allocations.

For P5, learners must demonstrate how they have provided support such as greeting delegates, checking equipment is working, taking notes and recording attendance and cancellations. Evidence can be in the form of observation records or witness testimonies, together with a written account.

For P6, learners should illustrate their answer with examples of different problems, for example faulty equipment, non-delivery of resources, typographical mistakes on invitations. Learners can identify problems they have experienced and explain how they resolved them, or they can be given examples of typical problems and explain how they would deal with them.

For P7, learners must describe the processes to be followed when clearing and vacating the event. They must include how the event evaluation should be coordinated, the preparation and circulation of materials, and any budgetary reconciliation. Evidence can be in the form of a report or presentation.

For P8, learners need to review the success of the event. This can be where learners judge not only how well it went in terms of its objectives, but also how well they were able to organise and support it overall.

For M1, learners must extend their knowledge of organisational and legal procedures for organising supplies and explain how these can affect the planning of a business event. They can draw on their evidence for P1 and select examples of supplier contracts and agreements, such as booking a hotel venue or hiring equipment, and explaining how consumer protection legislation covers faulty equipment.

For M2, learners can build on P2 and identify the event, for example an in-house training seminar or an off-site exhibition, explaining the similarities and differences of the key planning activities they will need to undertake.

For M3, learners can build on P5 and identify different methods of evaluation, for example a questionnaire for delegates or a debriefing session, explaining how they contribute to identifying problems and providing solutions for future events.

For D1, learners can develop the evidence produced for M3. They must make justified recommendations for improving future events.

For D2, learners need to evaluate feedback from people attending the event, perhaps gathering the information from evaluation sheets.

### Programme of suggested assignments

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

Criteria covered	Assignment title	Scenario	Assessment method
P1, P2, M1, M2	The Event Organiser.	Brief from local business to organise a promotional event for a new product or service.	Prepare a presentation on the role and skills of an event organiser.
P3, P4	Planning an Event.	Brief to include details of the type of event – must have a business purpose and a realistic budget for the planning activities.	Produce a portfolio of evidence: <ul style="list-style-type: none"> <li>a written plan for the event with tasks and timescales</li> <li>records of activities carried out to organise the venue.</li> </ul>
P5, P6, P7	Running an Event.	Brief to identify which administrative activities to be carried out during and after the event.	The portfolio to include: <ul style="list-style-type: none"> <li>records of tasks carried out to support the event</li> <li>witness testimonial from tutor confirming support provided.</li> </ul>
P8, M3, D1, D2	Reviewing the Success of an Event.	Brief to include evaluation of the success of the event.	Learner review (either one-to-one with tutor or written document) on success of the business event.

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

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

Level 2	Level 3
Providing Business Support	Supporting Business Activities
	Business Project Management

This unit links to the Level 3 National Occupational Standards for Business and Administration, particularly Units 311 and 313.

This unit also links to the Level 3 National Occupational Standards for Management and Leadership, particularly Units B1, D1, E1, E2 and F01.

### Essential resources

Centres need to have access to a range of office equipment and systems for learners to practise and develop their administrative skills when managing events. This may be in the form of a model office comprising a computer, printer, photocopier and telephone.

### Employer engagement and vocational contexts

Visits to businesses and from guest speakers will be useful for the delivery of this unit. Event organisers who can talk about the types of problems encountered, approaches to planning and running an event, and how this informs the success of the event will be invaluable. In addition, visits to different types of business events to observe the administrative support needed, will be useful.

### Indicative reading for learners

#### Textbooks

Carysforth C and Rawlinson M – *NVQ Level 3 and Technical Certificate Business and Administration* (Heinemann, 2006) ISBN 0435463349

Craven R and Johnson L – *Complete Idiot's Guide to Meetings and Event Planning, 2nd Edition* (Alpha Books, 2006) ISBN 1592574629

Friedmann S – *Meeting and Event Planning for Dummies* (Hungry Minds Inc, US, 2003) ISBN 0764538594

#### Journals

*Event* (Haymarket Business Publications Ltd) – exhibitions and live events information

*RSVP* (Haymarket Business Publications Ltd) – magazine that provides advice, leads and tips on how to stage the perfect event

#### Websites

[www.cfa.uk.com](http://www.cfa.uk.com) The Council for Administration

[www.evolutionevent.com](http://www.evolutionevent.com) Event management company website with case studies of events organised for major companies such as Microsoft and BT

[www.thetimes100.co.uk/home.asp](http://www.thetimes100.co.uk/home.asp) Free materials and case studies

## Delivery of personal, learning and thinking skills

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

Skill	When learners are ...
<b>Independent enquirers</b>	exploring the role of the event organiser producing guidelines for dealing with problems using reasoned arguments
<b>Reflective learners</b>	evaluating the success of the business event
<b>Team workers</b>	planning and agreeing a business event with others
<b>Self-managers</b>	planning a business event, working towards goals organising time and resources
<b>Effective participators</b>	taking part in group activities, working with colleagues, supervisors and managers.

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

Skill	When learners are ...
<b>Independent enquirers</b>	identifying and clarifying which activities need to be completed in order for the business event to take place successfully
<b>Creative thinkers</b>	generating ideas for the business event adapting their plans for the event as circumstances change
<b>Reflective learners</b>	assessing the success of the business event after it has taken place setting goals and success criteria for the business event reviewing progress while planning the business event, acting on the outcomes as necessary inviting feedback from others on how well the business event went
<b>Team workers</b>	adapting their behaviour depending on whether they are planning or supporting a business event
<b>Self-managers</b>	showing flexibility when plans for the business event need to be changed responding positively to changes when trying to plan the business event
<b>Effective participators</b>	planning their business event, such as proposing practical ways forward and breaking these down into steps.



## ● Functional Skills – Level 2

Skill	When learners are ...
<b>ICT – Use ICT systems</b>	
Use ICT to effectively plan work and evaluate the effectiveness of the ICT system they have used	using electronic planners to plan a business event
<b>ICT – Find and select information</b>	
Select and use a variety of sources of information independently for a complex task	researching the role and skills of an event organiser
<b>ICT – Develop, present and communicate information</b>	
Enter, develop and format information independently to suit its meaning and purpose including: <ul style="list-style-type: none"> <li>• text and tables</li> <li>• images</li> <li>• numbers</li> <li>• records</li> </ul>	preparing a plan for the business event evaluating success of the business event
Bring together information to suit content and purpose	researching the role and skills of an event organiser preparing a plan for the business event
Present information in ways that are fit for purpose and audience	preparing a plan for the business event
Identify the situation or problem and the mathematical methods needed to tackle it	producing budgets and calculating financial requirements
Select and apply a range of skills to find solutions	producing budgets and calculating financial requirements
Use appropriate checking procedures and evaluate their effectiveness at each stage	
Interpret and communicate solutions to practical problems in familiar and unfamiliar routine contexts and situations	
Draw conclusions and provide mathematical justifications	drawing up final budgets
<b>English</b>	
Speaking and listening – make a range of contributions to discussions and make effective presentations in a wide range of contexts	planning a business event
Reading – compare, select, read and understand texts and use them to gather information, ideas, arguments and opinions	
Writing – write documents, including extended writing pieces, communicating information, ideas and opinions, effectively and persuasively	preparing documentation in support of the business event.