Competencies and Maturity models

Towards the Integration of Event Management Best Practice by the Project Management Process - continued

Draft - Version 1 29/06/2002

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Abstract

This paper explores the maturing of the event industry and the need to measure the capability of event organisation, suppliers and personnel. It describes the adaptation of the project management models of competency and maturity to the event industry. In this way it looks at the theme of this conference - how we can contribute to the professional development in the event industry. It continues the work found in the paper for the Events 2000 conference.

The topic covered include

1.   Convergence of project management and events management an overview of the original paper and subsequent research

2.   Competency standards for event management : including a competency matrix used by the author for teaching events management

3.   Maturity model for the event industry : an exploration of this field and its possible adaptation to event management

Convergence

The Sydney Olympics, Brisbane Masters Games and the Melbourne Grand Prix have more in common than fact that they are based on competition. They all involved the use of the project management methodology as the core management system. The advantage of using project management were obvious to the management team. The advantages include :

Systematic

It provides a consistent method for events so that they can be compared to past events and identify improvements. Each event becomes a way of improving the event management and therefore the events.

Communication

Using a common terminology throughout the event and with the stakeholders allows effective decision making. Project management terms are ideally suited to communication across the event, external to the event to other departments and to outside authorities. The terms used imply the importance of time and responsibility.

Conform with other departments within the company.

Many large companies are undergoing a process of projectisation whereby each department or cost centre uses the project management methodology. The event office will find that communication and reporting will be enhance - not to mention respect for the event office.

Accountable

With a project management system the event is fully accountable to the stakeholders. The event management can track a complex event. Client/sponsors can obtain a report on progress at any time. After the management method and decisions can be fully described.

Visible Event Planning

Too often the event management is not seen to be happening and it is only the result i.e. the event, that is seen. If you look observe any other department (or cost centre as they are now called) there are weekly progress reports, charts and other documents that demonstrate the management - not just the deliverable.

Training

Having a methodology means the staff are being trained at the same time as organising the event. It is easier to train the staff as it is systematic and often enhances their previous training. In modern business the training component is essential to keep staff. Also project management uses training resources that may not have occurred to the event manager - the Belbin team role model for example

Depersonalizes the event

The event becomes part of the knowledge of the company, rather than the knowledge of a few individuals. A system stops the 'run over by a bus' risk i.e. that the event manager holds all the keys to the event.

Transferable

A methodology implies that it can be used in other events and also other areas of business -such as campaign management, public relations scheduling. The knowledge, skills and terminology are readily adapted to other projects. This is a plus for the staff working on an event.

Diverse Body of Knowledge

Too often the event management assumes there is nothing that can be leaned from other projects. In part this is a result of not recognizing the underlying similarities. These range from NASA's man on the moon to implementing a new software system for a local firm. Event management can learn from their mistakes and successes.

Scalable and fractal - it can be used on part of the event , such as the Public Relations schedule or finding sponsors or on the whole of the event. It can be used on a small event such as a wedding or

Already in use - the computer software so essential to the modern event is based on project management principles. The file system is almost identical to a work breakdown structure. Every day the staff are using a form a project management when they receive emails, file them , schedule meetings and document decisions. Project management puts all these tasks into a framework from the perspective of the event.

(O'Toole W & Mikolaitis P 2002)

Figure 1 Project Management Cascade (from Events 2002)

Limitation of project management

Most of the limitations to the application of project management to events arise from the hegemony of civil engineering and construction in this field. They have set the standard approach to projects. The current turbulence in the project management field is a result of the growth and influence of the information technology. Some of the limitations listed below are also limitation in its application to software development.

Scope

A central tenet of project management is the defined scope. The scope of work becomes the master plan from which the schedule, tasks, responsibility charts and budget are generated. If the scope changes it shapes all the work derived from it. In Figure 1, the top of the project management cascade is the project definition and

scope. It is often the case in special events that the scope of work is changing right up to the beginning of the event. In some events - such as the Melbourne Grand Prix - the managers apply a cut off date months out from the event . From that date there can be no more changes.   The scope changes in the East Timor hand over ceremony were extensive. It included the arrival of the six war ships of the Indonesian Navy and last minute decisions by VIPs to attend the event. In many cases the special event is being defined at the same time as it is being planned and the draft plan is being implemented. This situation is chaotic for the traditional project manager. The only projects similar in this respect are research and development projects where discovery is a key element of the project.

A consequences of such a fluid environment is the need to make 'decision on the go'. This is another important part of event management. When there is the addition of an extra VIP at an event , for example, the event management needs to know what affect this will have on the event and make decision accordingly. There is often little time to consult the committee or make reports. It is interesting to note a problem faced by the management of the East Timor handover ceremony. The UN has strict procedures for any changes in the plans and therefore the time taken for approvals to be granted meant that some decisions were impossible to make.

Deadline

It is common for a project to go past its 'deadline'. One only has to consider many construction projects. However this is intolerable in events. If the event looks like it will not occur on time, it will be cancelled. Postponing the event is possible but rare. This results in a different imperative in the event industry to almost all other industries. The fact of a deadline reflects back into every area of event management. It is part of the event culture. It is the one area that project managers, coming into the events field, need to realize. The Sydney Olympics provided many examples of this including the last minute call for volunteers help the bus drivers navigate the suburbs of Sydney. The importance of leadership, networking and informal contacts within events is a result of deadline management. The event management is forever creating contingencies.

Project Management terminology

The terminology of project management comes from engineering and operations research and often sounds foreign to the average event staffer. However if we are interested in creating a profession we need to have terms that are specific, 'communication rich' and transferable. Anyone working on an event with people from different work and cultural backgrounds knows the problem of miscommunication. It becomes a major problem when there is a crisis. Hence the importance of the correct terminology in risk planning for events. The staff needs to learn the terms and what they mean. The training, however, is not just for the one event. The terminology can become the language of events. It was an early task for the project management of the Sydney Olympics. See Allen J O'Toole et al 2002, for a discussion of the language of the Olympics.

Cost benefit analysis

Most projects arise from the requirements of business. In other words they have a defined and straightforward business case provided by the client. From the business case the project manager can work out the internal rate of return and the benefits and costs of any changes during the plan. When the inevitable changes occur, the decisions needed to solve problems can be measured against the ultimate business case. Hence the various tools used such as earned value analysis and estimating the pay back period. A large part of traditional project management is built on this certainty.

However there are intangible benefits from many events Staff morale or country pride, for example. There are difficulties tracing event the tangible benefits directly to the event. Extra sales arising from a training seminar or economic impact of a conference on the city are examples of this. Currently there are few models to capture and measure these benefits. The up shot is that any change in the event cannot be mapped back to the cost benefit analysis. For example it is difficult to establish that the choice of a certain venue would give greater benefits (except by reducing costs) to launch of a forklift. That is not to say it is impossible. Intangible issues are common in marketing and politics. There are ways of measuring them.

Notwithstanding these limitation of current project management practice, the benefits far out weigh them. Many of the limitations are ones of priority. The three dimensions of any project, i.e. cost/time/scope, are regarded are the parameters of the project. It is obvious that time can not be changed. So the event manager concentrates on the cost and scope to make sure that the event comes in on time. This is a matter of priority in the use of project management methodology.

The profession

The importance of having a transferable methodology can not be underestimated. If we compare the professions, trades and unskilled jobs, the characteristic of a profession is the use of a methodology. Trades, professions and unskilled work have informal methods taught on the job. These are commonly called heuristics. The trades and professions have a body of knowledge specific to that industry. The body of knowledge is collected over time and reside both in the minds those in the industry, articles, associations and books on the subject. I believe the event industry is at this level. A profession is characterized by the discovery and recognition of its underlying methodology. A systemic approach that can be improved and needs to be taught at a University level. The methodology recommended by this paper and the paper from the Events 2000 conference is an adaptation of project management. However this is not enough. A profession has to be able to measure the applicability of the methodology. This leads to the next section on competency and maturity in the event industry.

Competency

As the event industry 'professionalizes' there is increasing need to measure where a person, supplier or event organisations stands compared to the industry best practice.

The one off nature of an event means that the normal measures used in ongoing production industries do not work.

An area of current project management study that can assist in the professional development of the event industry is the notion of competency. According to Frame (1999) competency means the ability to produce the desired result. It can be applied to individuals and organisations. It implies there is an understanding of the 'desired' result and a method of producing it. With regard the events industry, the use of competency is all pervading as the client wants the event to come in on budget, fitting with brief and, of course, happen on time. However how do we measure the event staff, suppliers or how does the client measure the competency for future events? This directly relates to the 'bottom line'. If a supplier is hired without the right level of competency then there needs to be a contingency. For example hiring a printing company who has a high level of competency in design but a low level in delivering on time, means that the event company will have to create a contingency to ensure the printer is true to the schedule.

A measure of competency is needed in an industry that is subject to change and the need to lessen time to market for products. When data is so freely available over the internet, knowledge itself is easy to come by. The ability to use this knowledge is the value. For this reason competency is divided into hard and soft as well as knowledge, skills and attitudes. Hard competencies include the ability to make the knowledge work. Knowing the process of contract management is not enough to be able to manage contracts in the event business environment. The Guide to the Project Management Body of Knowledge is an example of competency based knowledge. The soft competencies are also needed to be a successful event manager, such as the ability to work in a team and work with suppliers as well as volunteers and paid staff.

Table 1 is an example of a competency matrix. It is used for the Event Project Management module for the Master of Project Management at the University of Sydney. (http://www.pmoutreach.usyd.edu.au/programme/Module/PMGT5885.html/) The course is aimed at project managers to enable them to adapt their knowledge and work in the event environment. They map their competencies at the beginning of the course and at the conclusion of the course.

Table 1 Competency Matrix - PMoutreach course

Competency Context	Aware	Informed	Involved	Competent	Best Practice
Stakeholder	Understand the concept of the event stakeholder	Able to identify all the stakeholder in an event	Able to prepare a stakeholder management plan	Able to identify limitations or	Develop improvements to the overall

Stakeholder management	Able to identify the major stakeholders and their primary influence for an event of any event			gaps in a stakeholder management plan	stakeholder management plan.
Marketing	Understand the importance of marketing to events and the use of events in marketing. Able to identify the marketing function of event management	Able to identify and describe the elements of marketing and how it related to events	Able to apply the principles of marketing to an event and create a marketing plan	Able to assess and improve a marketing plan for an event	Able to adjust aspects of the event that are Able to change the Marketing plan and the event as there are changes in the event environment.
Cost/benefit analysis	Understand the basic idea of CBA. Able to identify the obvious costs and benefits of any event	Apply the principles of CBA to an event	Apply a detailed CBA to any event	Able to identify gaps and improve a CBA of an event	Adjust the CBA to suit the changes of the event environment. Can assess the suitability of the CBA.
Project					
PMBOK	Understand the knowledge areas of PMBOK. Able to identify these knowledge areas in any event.	Can describe an event in terms of the PMBOK knowledge areas	Able to create a management plan based on PMBOK for an event	Able to identify the limitations of PMBOK areas to events and suggest changes	Able to fully assess the ability of PMBOK areas of knowledge to describe event management.
Risk management	Understand the process of risk management and how it would apply to events.	Can identify the risk management process in an event. Can identify the major risks to an event	Able to create a risk management plan for an event	Able to apply the risk management process to an event risk management plan. Able to integrate all the event plans under the risk management plan	Able to identify limitations of a risk management process to event management. Able to adjust the risk plans according to changes in the event environment
Contract management	Understand the process of contract management. Able to identify where contract management is used in events	Can describe the contract management process in an event	Able to create a contract management plan for an event	Able to monitor and control an event contract management plan	Able to identify gaps in the contract management process of any event and suggest improvements.
Systems	Understand the concept of systems. Able to identify elements of an event as a system	Can describe the event in terms of a system	Able to create a systems description of an event	Able to identify gaps in the event system and suggest changes	Establish a systems approach to event management. Adjust current system and compare with other disciplines.
Specific					
Site selection /design	Understand the importance of site selection and design. Identify the various event sites	Able to identify the elements of site selection and design of any event	Can identify the constraints and opportunities of afforded by a site/venue when matched to any event	Able to create a site selection and design checklist for any event	Manage the site selection and design for a specific event. Undertake post event reviews and improve the site selection layout and design.
Staging	Understand and identify the element of staging	Can describe he elements of staging and their relationship in any event	Can set up a draft stage plan for an event	Can identify the gaps in a stage plan for a specific event	Manage the staging of an event Undertake post event review and improve staging
Volunteers	Understand the importance of volunteers to events	Can describe the application of volunteer management in any event	Can create a management plan of the volunteers of an event	Monitor and control the volunteer plan	Manage the volunteers of an event. Undertake post event reviews and improve volunteer management
Deadline management	Understand the concept of the deadline and how it applies to events	Can describe the influence of the deadline in any of the PMBOK areas of any event.	Can identify the problems and change a management plan of an event according to the importance of the deadline	Monitor and control the overall event management in terms of the deadline	Identify the areas of any event that are on the critical path and suggest workable changes so that the deadline is met. Compare these adjustments with historical data

In summary, the latest movement in project management training and accreditation can provide the basis of event management training and accreditation. The competency model has been developed and works in other industries and should be considered for our industry.
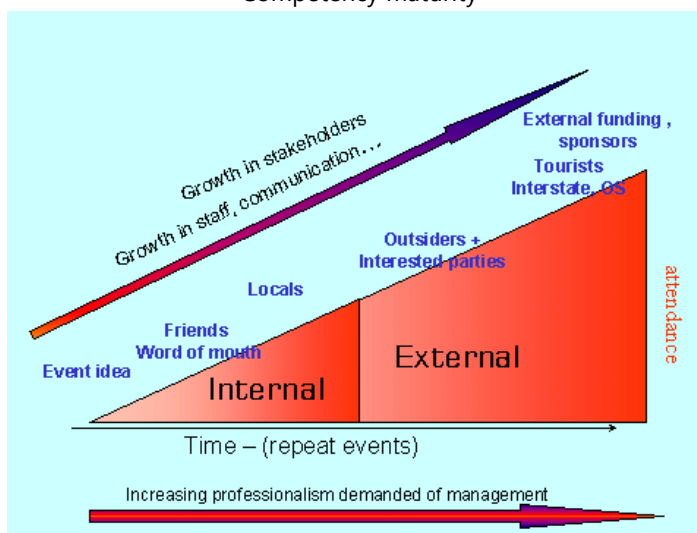
Maturity Model - organisational competency

The Maturity model refers to the level of organisational excellence of the event company, committee or organisation - such as the event office within a larger company. While an industry develops and grows the individual components change and mature. As with the competency model, the maturity model provides both a description of the current situation and the gaps needed to fill to become more efficient and effective. For this reason the model is part of the strategic planning for the industry. There are a number of maturity models that should be examined for their application to event organisations. The Capability Maturity Model developed by the Software Engineering Institute has been adapted to other industries. As well, the Project Management Institute is developing organisational maturity models. For more information on these models see the reference section of this paper.

Over time, a maturity model maps the changes in an event organisation. These are similar to a phase change in science whereby a product's basic structure undergoes transformation. One can track event companies across these levels of maturity. Many event companies start very entrepreneurial, dependent on the personality of the boss, full of ideas and brashness. As the company grows so does the complexity of its management, formal systems are introduced. Then there is the need to be accountable for their actions both within the company and to the stakeholders. At their height, the event company needs to have all of the above plus a method of learning and improving for each event.

This phase development is not confined to the corporate world. It is demonstrated in the area of public celebrations. Many annual festivals started with just a group of friends. People with similar interest turn up and the celebration grows. In this way community or small celebrations become major festivals. Figure 2 illustrate the growth of the local event. At the same time the event management - or committee - needs to grow and change. In particular there is a major phase change when 'outsiders' are attracted to the festival. Authorities become interested in the festival and it now needs to be documented and accountable. Insurance, bank loans , sponsors, legal requirements mean that the organisation has to be properly managed. In the long term, to survive in such a complex environment, it also needs have the ability to assess it management, think strategically, look for new ideas, and adapt to internal and external changes.

Figure 2 Event Growth

At this stage in the development of the event industry it is impossible to compile an exact maturity model. We need to start somewhere so I offer the list below to fire up the discussion:

The first phase is the **Initial or Informal,** characterised by the lack of any formal processes, an ad hok approach and often disorganised. The success of the event will directly depend on the personality of the event manager. There is no or little documentation and it is impossible to repeat the event. Planning, if any, is done on the run.

Formal : in a formal event organisation some of the processes are recognised and able to be repeated for the next event. Some of the events are over organised and other lack any detail in their management. The is some documentation and reporting. Risk management is done from an safety point of view. Historical information is used and the work is scoped. The clients brief or statement of work is recognised as the major document. The event company would be a member of an association.

Managed or Accountable : the event company has written plans and monitors these plans with techniques such as regular reports and milestones. The plans are based on templates created from previous events. The risk management is integrated into the whole managing process. Staff are trained in the terminology and methodology of project and risk management. Forecasting techniques such as cost benefit analysis is performed for events. Event feasibility is an essential aspect of the process of choosing the event. There is an event manual. Stakeholder analysis is undertaken.

Optimised or Adaptable and Improvable : the event management , organisation or company has a strategic plan for their events and can adapt these plans to changing conditions. The individual events are regarded as a way to test the management system. Scenarios are developed and there is flexibility in response to unforseen risk creating a resilience in the organisation. Past events are archived so that their management can be compared to future events. Cost benefit analysis and sensitivity analysis is used both at the event level and at the strategic level. The management of the event are continually improving using management tools and techniques adapted from other industries such as information technology, engineering and the military and disciplines such as systems analysis and logistics. The event organisation provides training for their staff and therefore a career path within the company, within the industry and in related industries.

If these categories are then used as the heading of a matrix and the areas of event management are listed down the side, a table such as table 2, can be produced. This table can then be used by the event organisation to map their competencies.

Table 2 is a draft for the purpose of discussion. I have only filled in some of the cells. There needs to be more headings and detailed competencies. The construction of a valid and acceptable event organisation maturity model can only be achieved with input and assessment from event managers around the world. The PMI currently is conducting such a world workshop called the OPM3 program though their website. (see reference section)

Table 2 Event Organisation Management Maturity Model Standards   - First DRAFT (03052002) - for discussion

Explanations levels

- Informal level - where the event is organised on an ad hok basis , little is written down
- Formal level - the event has structured management with delegation
- Accountable level - this includes the competencies of the formal level and the event and the management can account for their management and decisions
- Adaptable level - this includes the accountable competencies and means the event management, although a formal system, can respond positively to change and improve for each event.
- Applicable - these Areas may not be part of the event (for example Tourism may not be a consideration for some events)

Internal

Area	Informal	Formal	Accountable	Adaptable and improvable
Management System	Depended on one personality	A management structure in place	Structure identified and documents with work areas	Ability change management and assess its effectiveness
HR -Staff and Volunteer	Group of friends. All event staff are known personally to the event manager	Uses volunteers/staff outside of organisation , uses some training a briefing	Defined and written positions with event responsibilities, tasks and schedules	Formal debriefing with volunteer and staff assessment
Risk Management	Responds to problems as they occur	Has a safety risks strategy , uses Aust' Standards. Has incident report sheets and a method for reporting risks	Uses a full risk management plan across all event areas	Employs a method to change the risk management plans and assess effective of plan
Financial System	Cash in cash out accounting	Book keeping system with commitment accounting	Accounting system integrated with other areas of event management, has a financial plan for capital growth	Financial plan integrated across all event areas with a CBA used. Plan is able to change with changing conditions and continually assessed.
Decision making	Decision left to event manager - sole authority	Delegations i.e. decisions allowed according to level of position in event	Approval method implemented for decisions, all major decision documented	Major decision and communication assessed and improvements suggested.
Logistics	Event manager is responsible. Based on verbal agreements	There is a schedule for logistics. Contacts are dealt with on a need basis.	Logistics is well documented and includes sourcing contract managements and scheduling	Logistics is optimised and monitored for improvements. Each event is regard as a way to improve the event logistics.
Staging	Staging is ad hok and	Staging is scheduled and	Using stage plan, schedules, and	

	often confused	themed.	integrates into overall event schedule	
Themeing				

External

Area	Applicable	Informal	Formal	Accountable	Adaptable and improvable
Sponsorship		Sponsorship sought	Sponsorship gained and monitored	Levels of sponsorship Documented sponsorship plan	Sponsorship continually monitored for improvements
Grants					
Community relations					
Marketing and promotion					
Economic Impact					
Tourism					
Environment					
Growth potential					
Stakeholder relations		Can list the stakeholders	Creates a list of stakeholder and a management plan	Detailed stakeholder management plan (SMP) integrated with risk management plan	Able to assess the SMP and change it during the course of the event.

Conclusion

This paper follows the paper presented at the Events2000 conference. It began with a summary of the reasons for the adaptation of project management to event management. A sign of a profession is its methodology. The transferable and accountable methodology separates a profession from a trade. Once a methodology is accepted it is important for both the event staff and the event organisation to have a way to measure their progress. Competency models provide this measure. At this stage in our industry's development we can only identify this need and create a draft. It should to be prepared at the same time as the industry develops so that any company or individual can recognise their level and identify gaps in their professional development.. We have the advantage of building on the work of the project management profession.

The Next Step

Judging by the development in other disciplines and the fact of our ever changing business environment, competency and maturity models will come to the fore. The event industry can create these using this paper as the beginning of the discussion. The present matrix may be wrong, in need of improvement or just need to be filled in. Whichever is chosen it shows an industry that is capable of correcting itself and an industry with a strategic vision. If we use the maturity matrix presented in this paper, it shows an industry at the highest level.

A few next steps

1.   Creation of a competency model for the event profession

2.   Creating a competency model for event suppliers

3.   Create a maturity model for event organisations

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