

Event Evaluation

Instructor's Manual

6: Establishing the Evaluation System

This is the instructor's manual produced to accompany the book *Event Evaluation: Theory and Methods for Events and Tourism*, by Donald Getz, 2018, published by Goodfellow Publishers Ltd.

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Lecture 11

6.1 Introduction (p. 61)

This chapter provides advice on how any organisation can, and should, establish a permanent evaluation system, integral to all its planning and control functions. This discussion provides a foundation for the Event Compass featured in the next chapter.

6.2 The learning organisation (p. 62)

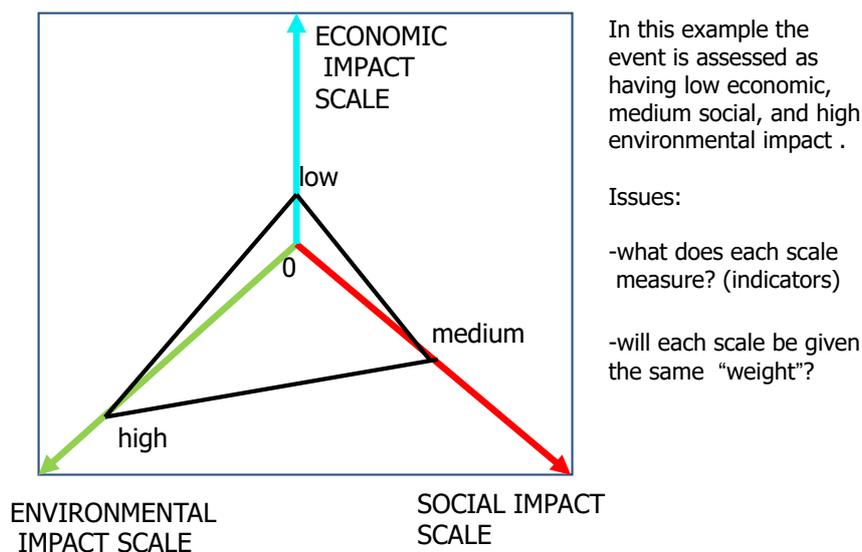
Evaluation is central to the “learning organisation” as, now matter how it is described, we cannot expect learning or continuous improvement except through professional self-reflection and formal evaluation.

The culture of an event or tourism organisation will certainly influence its desire and ability to plan and evaluate systematically. Look locally for examples of organisational types and structures that do or do not do a good job in this context, and try to find reasons. Getting some guest lectures from practitioners would provide a forum.

6.3 The triple-bottom-line and the balanced scorecard (p.63)

“These two concepts have found a place in management theory and ethics, and both provide a foundation for our recommended event evaluation system.”

I encourage TBL-thinking, but by using only economic, environmental and social dimensions it is inadequate - merely a starting point for discussing systems and comprehensive evaluation. In the diagram below the *incommensurability problem* is highlighted. Meaning that the three dimensions of TBL cannot be compared directly using the same metrics. But they can be compared if a subjective scale is used, such as high, medium, low goal attainment - thereby foreshadowing our approach to the Event Compass.



Triple bottom line measurement: Adapted from: Fredline, E., Raybould, M., Jago, L., & Deery, M. (2005). Triple bottom line event evaluation: A proposed framework for holistic event evaluation. Paper presented at the third international event management research conference, Sydney. University of Technology, Sydney.

You will find many sources for the “balanced scorecard”, and the concept has gone through three or four general revisions and expansions. It was a base for developing the Event Compass and for the use of goal-attainment, logic models and KPIs in evaluation. For the diagram below, Figure 6.2 (p.65) I have modified the four original quadrants, which are intended to be critical success factors for businesses, to reflect more of a sustainability and responsibility paradigm that I recommend as being suitable for planning and evaluating events and tourism. In particular, while for-profit businesses in other sectors can remain focused on customers, I believe events and tourism organisations must consult and engage a wide range of stakeholders - especially residents. Note that this is as much a planning model as it is a guide to what has to be evaluated.



Figure 6.1: Modified balanced scorecard concept for event management and event tourism (adapted from Kaplan and Norton, 1992)

Exercise:

Specify the evidence needed to determine how well an event or tourism organization is doing in each of the four quadrants and the central box. Try to find a real event with documentation to analyse in this way, resulting in a “scorecard”. Even more informative for a class could be to work with practitioners to help them develop their own scorecard, as their reflections would add to the learning.

Lecture 12

A recent innovation has been the “strategy map” as illustrated in Figure 6.2 (p.66). An important feature is the “destination statement”, based on mandate, vision and core values, all of which have to be made explicit - in other words, a statement on what the organization believes in and where exactly it is going. With that made clear, the map (in much greater detail than this diagram) shows how to get there. I particular like the value statements, as these reflect all the value perspectives covered in this book. “Enablers” can be viewed as the kind of critical success factors found in the balanced scorecard, or the CIPP model, including principles for the Learning Organisation.

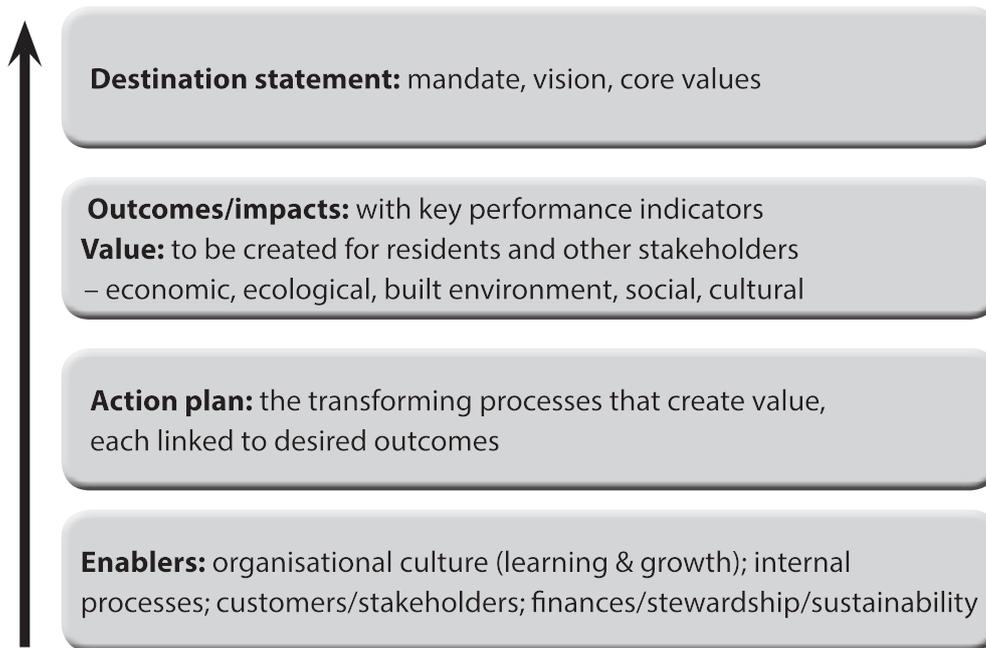


Figure 6.2: Generic strategy map structure

Vision, relevant metrics (i.e., KPIs), causality (the logic model), ownership and buy-in (by managers, staff, stakeholders) and adaptability are all crucial for implementation of strategy maps and any planning/evaluation system. On pp. 67-9 are the steps involved in implementation.

Exercise:

I think students should be able to develop a strategy map on their own, or in small groups. They will start with the balanced scorecard, then use its elements and principles to create the strategy map. It can be done for any kind of event or organization. Conceptual links to logic models will become obvious.

Questions

Q: Explain why every organization should establish a permanent, comprehensive evaluation system.

A: Frame the answer in the context of systems thinking, learning organisations, organizational culture and continuous improvement.

Q: Understand the meaning of a 'learning organisation' and the critical importance of evaluation in fostering adaptability, innovation and success.

A: A good answer should specify the five disciplines of Senge (p. 62) and describe how evaluation/learning fosters adaptability (i.e., reacting to environmental pressures and changing for sustainability), innovation (generating and implementing new ideas based on knowledge of what works or does not), and success (attaining whatever goals are deemed important).

Q: Understand evaluation issues related to organisational culture and change.

A: The culture of some organisations is supportive of learning and strategic change, but others are not - resistance to evaluation is a real-world problem. Leaders act to change culture.

Q: Be familiar with triple bottom line and balanced scorecard models and how they inform evaluation.

A: For the TBL discuss how it encourages systematic and comprehensive thinking, and specify the measurement problem (incommensurability). For the balanced scorecard, describe how it is a framework or model for conducting evaluations of organisations and how they pursue success.

Q: Understand how a strategy map incorporates the evaluation system.

A: it should be easy to draw an example, then explain where exactly evaluators need to act. The strategy map is in fact a planning process that depends upon evaluation to determine effectiveness.

Q: Be able to plan and implement an evaluation system for an organization.

A: The ten-step process begins on p. 67. Looking ahead, the Event Compass could be mentioned here.

Essay-Style

Q: Describe how the “learning organisation” depends upon evaluation, and how organisational culture might be an impediment to establishing a comprehensive evaluation system.

A: Same as the short-answer Q above, but in an essay I would want to see both an explanation of org. culture and the learning org. and a well-developed argument on how to influence change, learning and sustainability or success. A good answer will also talk about how leaders can influence the change process and how evaluation fosters change.

Q: Are Triple Bottom Line and Balanced Scorecard models the same? Explain how an event or tourism organisation can incorporate these models into its culture and strategic planning.

A: Explain how TBL is a starting point for comprehensive evaluation and also illustrates a measurement problem, whereas the balanced scorecard is a more refined (and evolving) model for evaluators and planners in pursuit of organizational success. Again, the ten-step process for implementation of a system is relevant.

Q: Prepare a strategy map for an event or tourism organisation and specify in detail the evaluation components.

A: In an essay, the answer should demonstrate understanding of how the strategy map follows from the balanced scorecard, and is both a planning model and a guide to organizational evaluation. The answer should also demonstrate understanding of “enablers”, “action plan”, “outcomes/impacts”, and “destination statement”, in part by giving examples.