Event Evaluation Instructor's Manual

7: Goals and Goal Attainment

Lecture 13

7.1 Introduction (p. 70)

Goal-attainment is the dominant form of planning and evaluation. It might be helpful here to discuss goals in the context of planning models. If not already done, real-world examples of goals should be reviewed - both for events and tourism. Numerous suggested goals, with pertinent KPIs, are suggested throughout the book.

In the extra diagram below I have indicated major stakeholder value perspectives that invariably must be engaged at the community and city level for event portfolio or event tourism planning. Can "benefits for all" be identified? Within each circle are obvious goals for the stakeholders, but within the central part of the diagram are suggested commonalities - goals the hopefully everyone can agree to pursue. This model can also be viewed in the context of achieving sustainable cities.
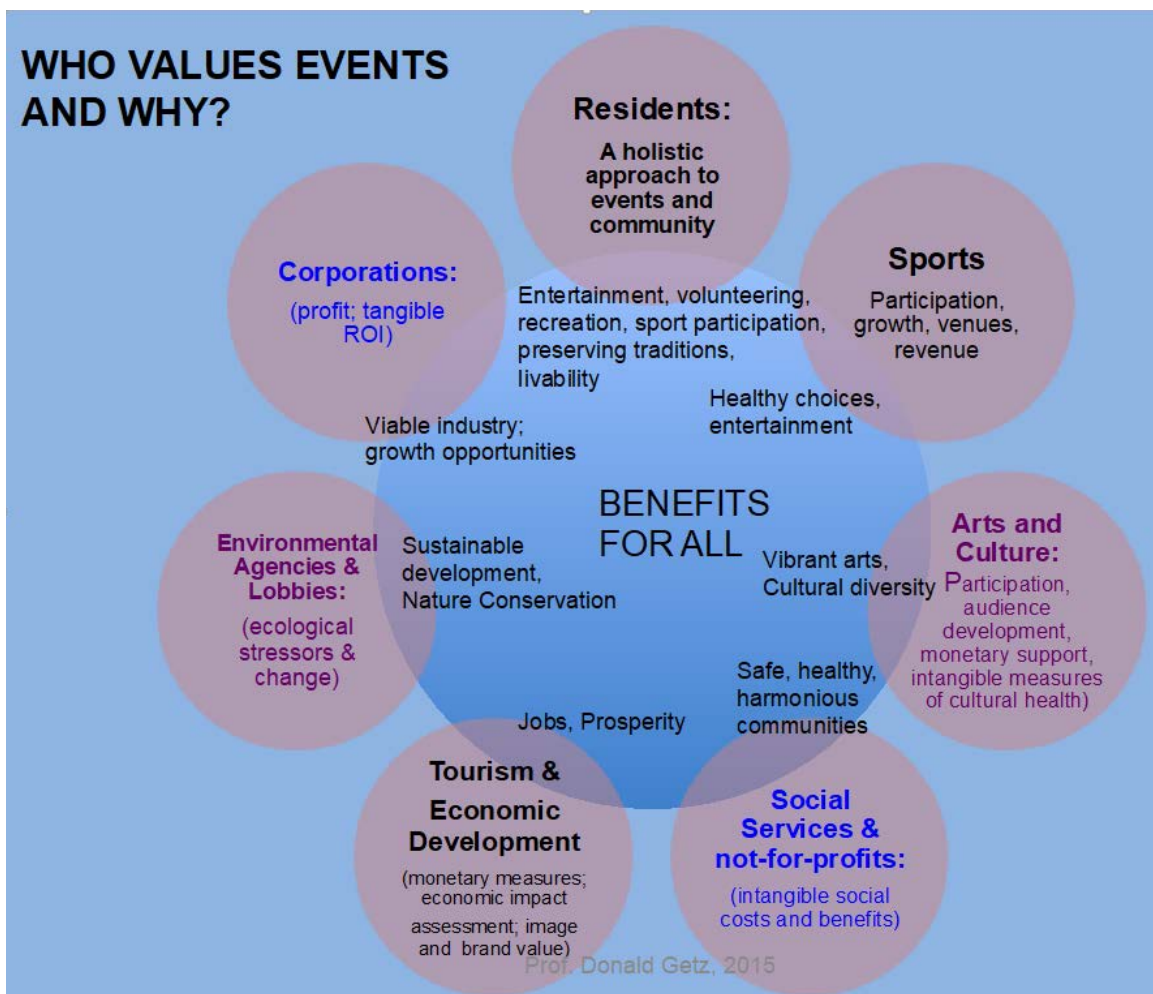
7.2 Goal-free evaluation (p. 71)

Beware "tunnel vision"! Goal-free evaluation is for experts in evaluation who really know events and tourism. There is a formal definition of "externality" on .p. 71.

The model (Fig. 7.1) admonishes evaluators to look for externalities and unintended and negative impacts, not just whether or not goals have been obtained. Learning about externalities and other outcomes is a way to foster improvement and even to develop theory.
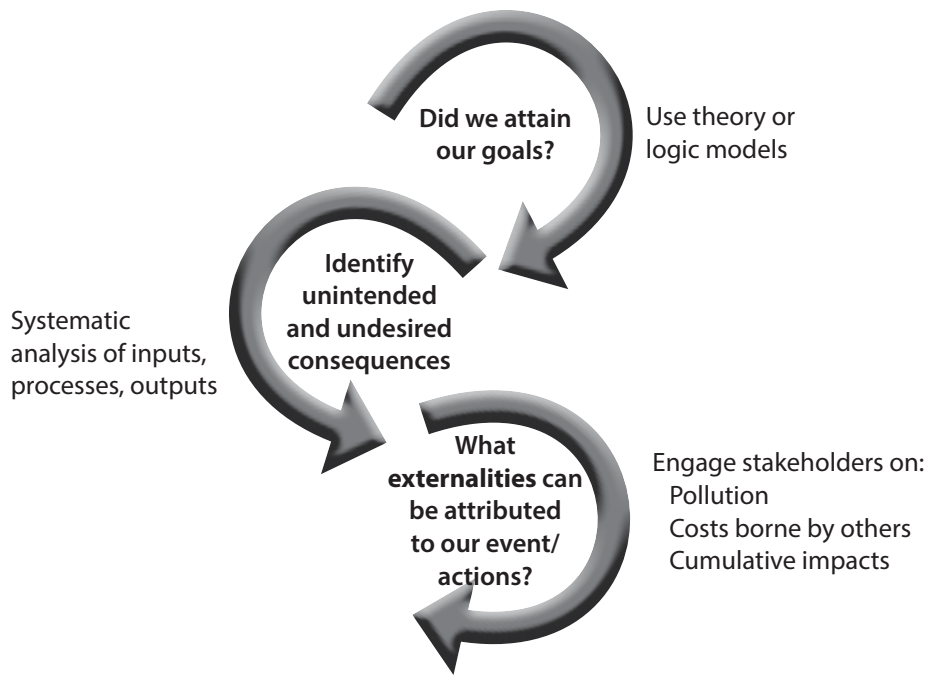
Figure 7.1: Overcoming tunnel vision

7.3 Task analysis and the work plan (p.72)

Students would benefit from some background on project planning and logistics here. Can they use project management software and do a critical path? This is another argument for incorporating a full evaluation system into the planning and management functions of all organisations, because when task analysis is carefully constructed and the work plan detailed, evaluators have an easier task when it comes to examining deviations.

Exercise:

If possible, use project management or critical path software to perform a task analysis for one aspect of event production, such as the logistics associated with access and egress (cars, pedestrians and suppliers). For each task, determine what the evaluator must measure, and how, to confirm compliance with assigned tasks.

Lecture 14

7.4 Case study: The Event Compass (p.73)

I helped develop this model, now operated through Mid-Sweden University, and its origins can be seen in the TBL approach and balanced scorecard. It is not only an evaluation and planning system with great flexibility, but it provides a structure for certification of events and venues and for consultants to advise organisations. Like other systems, it starts with adoption of the concept, then implementation of its elements - perhaps one at a time.

Each of the three impact dimensions and five management functions can be broken down into many details - after all, a compass has 360 degrees! This model is simply a starting point for planners and evaluators within the organisation.

Figure 7.2: The Event Compass - Concept

Options for comparative measurement (p.74) is a key discussion. Unless you are willing and able to compare all dimensions in monetary terms (see the Research Note by Andersson et al on triple-impact-assessment) some other metrics are needed. The Compass uses goal attainment to compare progress along all management functions and impact dimensions. This encourages clear goal setting, the use of KPIs, formal evaluations and impact assessments, and ultimately leads to continuous improvement. There are options for evaluating goal attainment, ranging from very subjective ones like a report card to highly quantified scales like 0-100 based on consideration of all the KPIs applicable to each goal.

"Figure 7.3: Sample Event Compass Radar Graph" provides an example of the scoring system, in this case 0-100. It looks like the hypothetical organization does poorly in terms of risk management, but has achieved almost all its goals on the economic impacts dimension. This scoring can be done by consultants or certification bodies employing their own standards (i.e., what the organization is expected to do), or it can be an internal evaluation - typically part of strategic planning. "Weighting' refers to the possibility that some dimensions, goals or KPIs will be more important than others, and the Compass can easily handle these. It is also possible to do a Compass for just one management function or impact dimension, meaning the graph will show only goal attainment for that one element.

Figure 7.4 provides an example for the organizational domain, but there are many more details in this book in the two chapters devoted to evaluating organisations.

Figure 7.3: Sample Event Compass radar graph

Exercise:

Discuss the advantages and disadvantages of various measurement systems, particularly as they can be applied to the Event Compass or balanced scorecard, starting with a review of the TBL and the incommensurability problem. Does anyone believe that only monetary units should be employed? Are there other ways of "scoring" an organisation's effectiveness in its various departments and impacts?

Case Study: The Event Compass (p.77).

The description is provided by Compass developers at Mid-Sweden University.

7.5 The toolbox and database (p.80)

We have already introduced the toolbox, but there are two related topics introduced here - the database and standardisation. Every organisation needs its own database and information management systems, but to the extent that evaluators use standard methods and measures and overall events database can be developed for a city or region, enabling comparisons, trend and meta-analysis. "Figure 7.5: Sources of information, data required and methods" should be a target list for events and organisations wanting to obtain all the information they need to implement a planning and evaluation system.

Exercise:

Your team is a certifying body charged with determining if an event organisation is well managed (or sustainable). Specify at least three requirements for each of the eight dimensions of the Event Compass, that is what the organisation must be doing in each dimension; what evidence is required to support their accomplishments? This is the approach that certifying bodies have to take, but can also be a method of internal evaluation.

Questions

Q: Discuss the advantages and disadvantages of goal-free versus goal-attainment approaches to evaluation.

A: Goal-attainment evaluation is a common and important approach. Most planning models, including CIPP and balanced scorecard, are based on setting goals and determining how well they are attained, or problems in attaining them that can be corrected. Goals direct our action, and positive goals (things to achieve) steer organisations towards sustainability. But tunnel vision can arise and goals-free evaluation encourages a more systematic approach to finding externalities and unintended consequences.

Q: Define 'externalities', give examples, and discuss how evaluators can deal with them.

A: Externality: an impact that occurs as a consequence of events or tourism, the cost of which is borne by others (i.e., externalities are not part of the event's accounts). A goals-free evaluation approach will find externalities, as will the participation of residents and other stakeholders.

Q: How does task analysis and a detailed work plan help evaluators?

A:By specifying what workers are to do, and when, it becomes a straight-forward matter for evaluators to find, explain, and if necessary recommend ways to correct deviations.

Q: Describe the evaluation systems called the Event Compass in terms of how evaluators and planners can both use it.

A: Describe each of the eight dimensions, five for management and three reflecting the TBL on impacts. It is a system, like the balanced scorecard, to evaluate entire organisations and assist in continuous improvement.

Q: How does the Event Compass facilitate continuous improvement through its goal-attainment measurement system?

A: By using degrees of goal attainment the Compass allows comparison across all its dimensions and sub-dimensions. Within each dimension their will be goals and KPIs to measure goal attainment, and they can be quantified. When goals are attained new ones, more challenging, are to be set.

Q: What is meta-analysis and why does it require standard methods and measures?

A: If we want to develop theory from evaluation, the methods and measures have to be standardized. The examination of many evaluations is called meta-analysis.

Essay-Style

Q: In goal-attainment evaluation there can arise tunnel vision. What is the nature of this problem and how is it to be avoided?

A: Tunnel vision means looking only at stated goals and their attainment, with externalities and unintended outcomes possibly being ignored. In an essay, good answers should elaborate on what might be missed, such as hidden costs born by others, environmental impacts such as pollution, or even positive, synergistic effects with other events. There should be a discussion of how to engage residents and other stakeholders in identifying and analysing externalities and impacts, and how to conduct goal-free evaluation (at least in conceptual terms).

Q: Explain how the Event Compass implements key elements of the TBL and Balanced Scorecard models. Discuss the measurement problem (or incommensurability) and how the Compass deals with it.

A: A full discussion of measurement and incommensurability within the TBL is needed in an essay. The use of monetary measures alone can be criticised, but has its adherents. To fully implement TBL and balanced scorecard approaches we need comparable measures, and the Event Compass does this with goal-attainment indices. A number of alternative measurement systems for the Compass can be discussed, some being very qualitative (like high, medium, low attainment). The use of KPIs has to be mentioned, as these are the specifics being measured within each dimension - so give examples.

Q: Select three key event and tourism stakeholders and explain what goals they might have for a given event, then discuss the data and feedback they can provide for evaluation.

A: Refer to the "benefits for all" model to select stakeholders, then discuss their value perspectives and internal goals that they might bring to the table regarding a specific event. How can agreement be reached? In an essay, there should be examples of values and goals.