Event Evaluation Instructor's Manual

Introduction

The Author

Donald Getz is Professor Emeritus, the University of Calgary. In 2010 Professor Getz retired from full-time academic life in the Haskayne School of Business, but continued part time until 2015 at the University of Queensland, Sweden (university of Gothenburg) and Norway (University of Stavanger).

He continues to research and write, work as a management consultant, and is affiliated with Linnaeus University in Sweden. In addition to a broad interest in event and tourism studies, areas of expertise include wine and food tourism, evaluation and impact assessment, consumer research and special-interest travel. Professor Getz co-founded, and was an early Editor-in-Chief of the journal *Event Management*, founded in 1993.

Donald is author and co-author of a number of books that provide background to the current book and the series in which it is published, including *Event Management and Event Tourism* (Cognizant, 2d. ed. 2015); *Event Tourism* (Cognizant, 2013), and *Event Studies* (3d. ed. with Stephen Page, Routledge, 2016).

Prof. Getz worked with Goodfellow Publishers Ltd. to create this new series to fill major gaps in the literature, namely applying mainstream management theory and methods to events and tourism. Each book starts with theory, including models, frameworks, constructs and principles, then illustrates how methods that have become important tools elsewhere can be applied to events and tourism management.

FEEDBACK would be appreciated: Email: getz@ucalgary.ca

Teaching Evaluation and Impact Assessment

I have always believed that evaluation and impact assessment should be taught as integral parts of event and tourism management degree programmes, largely because there were obvious weaknesses in professional practice. As well, as I often taught planning (my first degree was in urban and regional planning), evaluation and impact assessment are integral to the process of planning.

Creation of this new book series provided the opportunity for me to write two companion books on these important subjects. This first one provides the foundations, being theory and methods from mainstream professional evaluation. The second book builds on evaluation and examines the many facets of impact assessment as applied to events and tourism.

Ideally, the graduate of event and tourism management degree programmes has had courses in methodology (within a philosophical context covering epistemology and ontology) research methods and statistics, to which evaluation and impact assessment can be added as specialization. These subjects can also be taught as professional or executive development courses for practitioners, and of course at the graduate level they are also appropriate.

The two books can be combined, but it is recommended that learners start with the basics of evaluation theory and methods before progressing to the more difficult matter of impact assessment and how it can be used within evaluation. There is minimal overlap between the books, and they can stand alone, but it does not really make sense to study impact assessment without the evaluation context. After all, why are IAs done if not to inform decision making?

Elements of evaluation and impact assessment should be introduced into practical management subjects, especially event planning and design, financing, logistics, human resources, and marketing. Relevant issues will arise in policy discussions. At a minimum, graduates should be able to apply concepts and methods from these companion books to their other studies.

In this book, *Event Evaluation*, I provide a "complexity model" to help justify the separation of the two books, although there is also the very practical matter of making the books short enough to be readable and the material manageable in one typical teaching term. Most evaluation occurs at the technical level of problem solving and decision support, ranging from data collection and monitoring to figuring out problems such as why marketing is not working, attendance is falling, costs are mounting, and what to do about it. Human resource issues no doubt account for much evaluation effort, including performance evaluations. Visitors have to be surveyed, and stakeholder input obtained.

Goals are set and some evidence has to be found to support claims of goal attainment - or the evaluator's task becomes determining why failure or inefficiencies occur. This is what I mean by "technical" evaluation.

In the *Impact Assessment* book the challenges being considered are much more complex politically, theoretically and methodologically. Can you prove that your event, or tourism, generates the benefits desired? Is it worth the costs and negative impacts created along the way? Who benefits and who pays? What evidence supports your claims that goals are being achieved, and is that sufficient justification to continue a grant or support?

What about long-term, cumulative impacts within a managed portfolio of events that are intended to make a positive contribution to the sustainable, liveable city? How does one even go about starting a project like that? Impact assessment is examined generically in the companion book, followed by applications to event and tourism that examine economic, social, ecological, built-environment and cultural perspectives.

Pedagogy

Learning styles should be taken into account when designing any course. Students easily get bored with lectures, even when they are based on an easy to read text and a nice set of PowerPoint slides.

Students are going to learn more by doing than by listening, hence the rise of experiential learning, simulations, internships and reflective professional practice as primary learning mechanisms. If you have guest lecturers, at least they are different enough to spark an interest, but even guests should be asked to get students actively involved in the classroom through exercises, discussions, and other means.

The options for "doing" as opposed to listening are plentiful, with examples discussed below. Which ones are best is obviously dependent on circumstances; instructors should experiment and evaluate them. This book provides material for any of the following:

♦   Case studies (readings plus discussion or debate)

♦   Scenarios (analysis and choice; problem solving)

♦   Class presentations (based on assignments or projects)

♦   The practicum (plan and implement an evaluation, with or without external help)

♦   Real-world assignments (job monitoring; research project; develop a case study or history; interviewing professionals)

♦   Field trips (to event venues; to event productions)

♦   Workshops (intensive, hands-on learning experiences)

♦   Exercises for classroom and projects

The problem with experiential learning for evaluation and impact assessment will be to find real-world examples of high quality. Links with government agencies, consultants and event organisers will pay off in finding reports, talking to practitioners with experience, or at least identifying problems and questions that can be addressed by students.

Probably one of the best experiential learning scenarios will be to require students to plan, design and evaluate a real event. Tourism students might be benefit from developing and evaluating or IA project for an existing, tourist-oriented event. When evaluation and impact assessment are built into the project from the very first concept, or goal, it becomes clear that you need a system, appropriate methods and measures, logic models and stakeholder input.

A radical pedagogical approach, perhaps more suited for executive education than the undergraduate classroom, would be to do case studies only - but where is that material to come from? I can suggest a related approach, and that is to concentrate on doing the exercises recommended throughout the book (there are at least two per chapter), then discussing the theory and methods that are linked to the problems. Readings would follow, not precede the exercises.

Key Objectives of the Book

♦   Inform readers on evaluation theory and methods for events and event tourism, including key concepts and definitions.

♦   Discuss key evaluation challenges for events and event tourism.

♦   Provide a comprehensive evaluation system that can be fully integrated into event and tourism organisations.

♦   Develop professionalism for evaluators in these fields.

♦   Recommend the goals, key performance indicators and methods for evaluation.

♦   Connect readers to the research literature pertinent to evaluation.

Event and tourism organizations and event managers need to implement a continuous process of evaluation in order to become learning organisations, to achieve their goals, and to meet all standards that are applicable. Some funding bodies insist that event organizers meet performance standards in order to qualify, while others demand comprehensive evaluations and public accountability. In these environments, a comprehensive evaluation system becomes essential, as does professionalism by evaluators.

Most evaluation at the level of a single event is related to problem solving and support for decision making, and these require fairly straight-forward data-collection techniques. More complex policy and programme evaluations that require determination or evidence of goal attainment can be approached through theory-based evaluations or logic models, and these are covered in this book. The biggest challenge of all is to determine the worth or value of an event, programme or policy, and a great deal of advice is provided on that challenging task, with emphasis on clarifying various perspectives on value.

In this book impacts and impact assessment are introduced, but a separate impact assessment book will provide details on methods for measuring and evaluating social, cultural, ecological, and economic impacts of events, as well as those relating to the built environment. That is where most of the tourism issues arise.
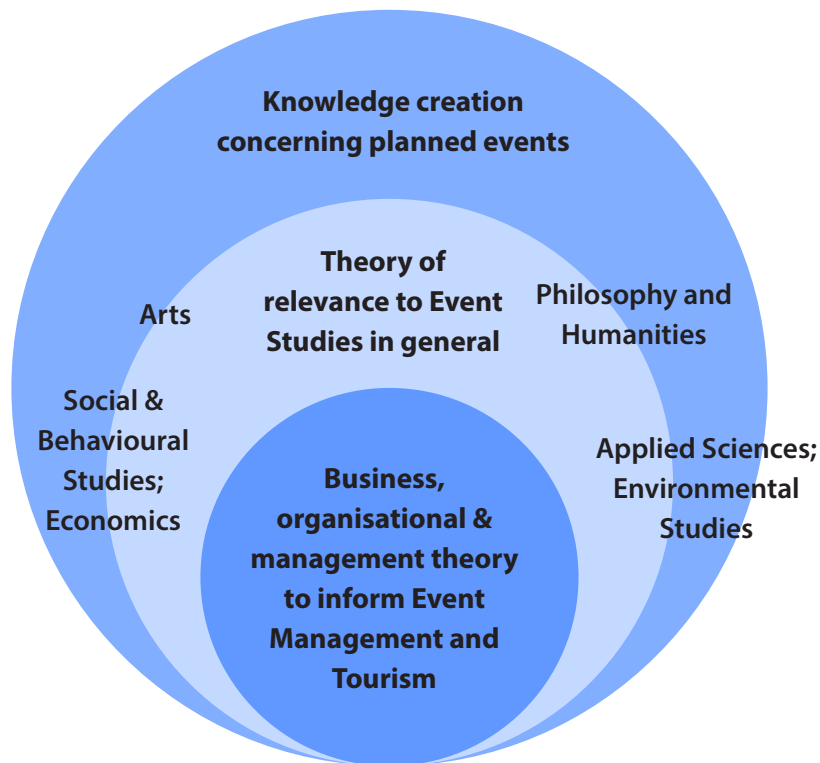
What This Book is Not

This book is not about research methods, it only introduces the methods and measures needed by evaluators; statistics are completely avoided. Evaluation has to be based on good research much of the time, so the evaluator's skills have to include research methods. On the other hand, people and organisations evaluate qualitatively all the time, in making judgements, giving advice on how things can be improved, and basing decisions on available information. Many events and programmes are valued intrinsically, based on cultural and personal values, for which research and metrics are not necessarily wanted or required.

The simple techniques explained in this book, such as checklists and systematic observation, can be used by any evaluator, but the more complex ones require a foundation in research methods. Several books are available specific to tourism, sport, leisure and events.

Organizing Principles

As mentioned, the books in this series all begin with mainstream theory and methods, with the diagram below illustrating the framework. In the case of evaluation and impact assessment, the theory of relevance comes mostly from the inner circle as it is clearly intended to inform management practices. However, when it comes to theory that can guide event and tourism managers in setting goals, and thereby establishing the parameters of evaluation and impact assessment, that theory can come from anywhere. For example, festivals with goals like "fostering community development" will have to start their planning with sociological theory.

Knowledge creation concerning planned events

Theory of relevance to Event Studies in general

Arts

Philosophy and Humanities

Social & Behavioural Studies; Economics

Business, organisational & management theory to inform Event Management and Tourism

Applied Sciences; Environmental Studies

Major Themes and the Index

Various themes run through this book and the soon-to-be-available companion book on Impact Assessment. The index is one starting point to link the pertinent sections. I have compiled the Index (painstakingly!) to include all the main headings found in the book, and all the other major evaluation terms and concepts.

The following themes are both a way to present and summarize material, and are potential essay and project subjects:

1   The overall theme is the necessity for, and nature of professional evaluation and impact assessment within event and tourism management.

2   Professionalism: This embodies consideration of EMBOK and MBEC, ethics, standards for professional evaluators and evaluations, how evaluation supports learning organisations and continuous improvement, and links to sustainability and social responsibility' evaluators as reflexive professionals always think about what they are doing and why, in the context of fostering integrity, accountability and transparency.

3 Integration of evaluation throughout event and tourism organisations, and especially their planning and design processes: Consider the systems model, CIPP, balanced scorecard and the Event Compass, and the emphasis on goal attainment; numerous goals and KPIs are suggested for all management functions and evaluation or impact assessment subjects.

4 Stakeholders: Who are they (especially the guests/visitors and residents), what are their roles in evaluation (consider internal versus external evaluations), and what is the nature of participatory evaluation? This book series will include a separate book on stakeholder theory and methods as applied to events and tourism.

5 Event Tourism and specific evaluation challenges: Evaluators have to consider what is unique about evaluation in a tourism context and apply appropriate methods and measures.

6 Theory: We have both theory-driven evaluations, and theories of evaluation. Paradigms are important, especially the differences between the positivistic paradigm with its emphasis on proving cause and effect and various interpretivist or interventionist approaches to evaluation. A key tool for evaluators is the logic model, either to reflect theory or help develop it, but more importantly to impose logic upon goal setting and evaluation.

7 Value and Values: Placing a value on events or tourism is at the heart of evaluation, and this often reflects underlying values or belief systems. Consider intrinsic and extrinsic approaches, stakeholders views, empowerment and evaluation, and the nature of professionalism.

8 Methods: The Complexity model sets the stage for distinguishing between the most common (and less-complex) evaluation *challenges* or tasks - the kinds most common within event organisations, such as checklists and scales - and the more complex (in political, theoretical and technical terms) challenges that one encounters more within tourism and other policy or strategy-oriented agencies, such as impact analysis. Evaluators have to have a firm base in research methods and analysis. Tools for evaluators are provided in Toolboxes throughout.

9 Models: A number of models or frameworks are presented for designing and conducting evaluations or establishing evaluation systems, including: blueprinting; CIPP; the complexity concept; Event Compass; five-gaps; Kirkpatrick; logic models; root-cause; SERVQUAL; strategy mapping.

10 Public Policy: The main issue related to evaluation is how governments can justify intervention, as this sets the stage for goals and goal-attainment evaluation projects. Also consider the various uses of evaluation, the need for accountability and transparency, stakeholder engagement, and principles for good governance.

11 Evidence: Since experimentation and proving cause and effect are not likely to be important in the events and tourism fields, this book stresses the nature and use of evidence. Consider what kinds of data or facts are appropriate given the evaluation problem, what is acceptable as sufficient evidence, and how does the evaluator make a convincing case?

12 Performance: The importance of specifications is highlighted, along with standards and scales for measuring performance in different settings. The performance of staff and volunteers is featured, as is quality in the minds of visitors.

13   Experience evaluation: This theme includes satisfaction measures, experience mapping, importance and performance analysis, ethnographic research and participatory observation.

14   Outputs, outcomes and impacts: These terms are differentiated. Consider also goal attainment, benefits sought, sustainability, forecasting, indicators and KPIs.

15   Planning and management: Sub-topics include design, marketing, resources, the systems model and systems thinking. The core anagement functions are covered.

The Figures

All the PowerPoint slides from the book that are line drawings are included in these notes, but not the Figures that are text lists only. Some extra illustrations are provided, taken from my other books or are personal creations; these extra illustrations are not to be circulated beyond the classroom.

Research Notes

The main purpose of adding numerous Research Notes is to encourage outside readings, and to make students aware of the research literature. They introduce many theories, methodologies and methods. Some of them can be used (that is, the actual papers) as case studies. Students developing research proposals should use these Research Notes as starting points, particularly when looking for references. Some are classics, and others have been selected because they are unique. They are not listed in this manual.

Case Studies

Several experts kindly agreed to provide cases reflecting their evaluative research. See the Event Compass (by Robert Pettersson and colleagues at Mid-Sweden University), Participant Observation by Richard Shipway of Bournemouth University, and Experience Mapping by Colin Beard, Sheffield Business School.

Learning Objectives

These questions essentially preview the topics for each chapter, and each one can be used as a test question, as modified in the Questions at the end of chapters in this Manual.

As the course progresses, students will be able to provide more thorough and detailed answers to questions. Students will get an introduction to numerous topics in the book, but they cannot expect that one book or course of study will fully equip them for professional practice. Students should be advised that learning objectives are also life-long, that they will always be trying to improve their knowledge and skills.

Recommended additional readings and sources

The recommended books provide background or elaboration to book contents. Be aware that web addresses do change, and the ones in the book were current in early 2018 when the book was finished. There are some really useful evaluation and impact-assessment sites for students and instructors to get additional advice.

Questions

Short-answer quiz or test questions, and suggested answers, are provided after every chapter, based directly on the Study Questions. There are also suggested essay-style or long-answer questions and advice on good answers.

Short-answer questions require mostly factual answers (i.e., definitions and explanations, many requiring examples). This material can be readily found in the text. Ideally questions for mid-terms and final exams will force students to integrate material from multiple chapters or the whole book.

The Chapters

1   Basic Concepts and Definitions

2   Value, Values and Evaluation

3   Theory

4   A Model of the Event Evaluation Process

5   Methods, Measures, and Planning an Evaluation Project

6   Establishing the Evaluation System

7   Goals and Goal Attainment

8   Evaluating the Organisation (Part 1)

9   Evaluating the Organisation (Part 2)

10   Evaluating Visitors and Experiences

11   Quality Evaluation

12   Evaluating Human Resources

13   Evaluation in Different Types of Planned Event

Lecture Outlines

For simplicity I assume two lectures per chapter, as 26 lectures seems reasonable for a 12 or 13-week term. Instructors will likely need flexibility in fitting all the material into the lecture times they have available. They might also want guests and films, group discussions and presentations, and all those things eat up class time.

The following table lists each chapter, divided into two lectures. Some lecture divisions seem logical in terms of the subject matter, but often the dividing line is arbitrary.

Lecture Sequence	Lecture Topics
CHAPTER 1: **Basic Concepts and Definitions**	L1: 1.1 Introduction 1.2 Unique aspects of events and event tourism L2: 1.3 Professional practice

CHAPTER 2: Value, Values And Evaluation	L3: 2.1 Introduction
	  2.2 Value and values
	  2.3 Evaluation
	  2.4 Intrinsic versus extrinsic
	L4: 2.5 Justification for public-sector intervention
	  2.6 Perspectives on event value

CHAPTER 3:
Theory
	L5: 3.1 Introduction
	  3.2 Theories of evaluation
	L6: 3.3 Continuum of event evaluation complexity
	  3.4 Evidence and proof
	  3.5 Systems theory and thinking systematically

CHAPTER 4:
A Model of The Event Evaluation Process
	L7: 4.1 Introduction
	  4.2 A model of the event evaluation process
	  4.3 Evaluation paradigms
	L8: 4.4 Evaluation contexts
	  4.5 Why evaluate?
	  4.6 What to evaluate?
	  4.7 Uses

CHAPTER 5: Methods, Measures, and Planning an Evaluation Project	L9: 5.1 Introduction
	  5.2 Measures
	  5.3 Methodology and methods
	  5.4 Data and data collection
	L10: 5.5 Planning an evaluation
	   5.6 Logic models

CHAPTER 6: Establishing The Evaluation System	L11: 6.1 Introduction 6.2 The learning organisation L12: 6.3 Triple bottom line and the balanced scorecard

CHAPTER 7:
Goals and Goal Attainment
	L13: 7.1 Introduction
	  7.2 Goal-free evaluation
	  7.3 Task analysis and the work plan
	L14: 7.4 The Event Compass
	   7.5 The toolbox and database

CHAPTER 8: Evaluating The Organisation (Part 1)	L15: 8.1 Introduction 8.2 Standards L16: 8.3 Ownership, mandate, governance, business model 8.4 Administration 8.5 Planning
CHAPTER 9: Evaluating The Organisation (Part 2)	L17: 9.1 Design 9.2 Management & decision-support information 9.3 Financial management 9.4 Risk management L18: 9.5 Human resources 9.6 Marketing and communications 9.7 Greening and sustainability 9.8 Social responsibility 9.9 Life cycles and evaluation
CHAPTER 10: Evaluating Visitors and Experiences	L19: 10.1 Introduction 10.2 The audience L20: 10.3 Experience evaluation 10.4 Case study: participant observation
CHAPTER 11: Quality Evaluation	L21: 11.1 How people evaluate service quality 11.2 Measuring quality: SERVQUAL L22: 11.3 Importance-Performance evaluation 11.4 Service blueprinting and mapping 11.5 Evaluation of crowd management & control 11.6: Case study: Experience mapping
CHAPTER 12: Evaluating Human Resources	L23: 12.1 Introduction 12.2 HR planning and management evaluation 12.3 Motivation, satisfaction, commitment L24: 12.4 Evaluating training effectiveness 12.5 Performance evaluation 12.6 Critical incidents
CHAPTER 13: Evaluation in Different Types of Planned Event	L25: 13.1 Introduction 13.2 Business events L26: 13.3 Festivals and cultural celebrations 13.4 Sports