**Cambridge International Diploma in Travel and Tourism
Advanced Level**

Scheme of Work

5264
Event Planning and Promotion
Optional Module

UNIVERSITY *of* CAMBRIDGE
International Examinations

Introduction

This module is a practical component of the Diploma qualification and gives candidates an opportunity to demonstrate understanding of the theory in the Core Module, particularly A (Travel and tourism development) and B (Marketing and promotion techniques) with some elements of C (Destination management) by planning and promoting a travel and tourism event. It focuses on factors needed to stage an event and the key promotion techniques necessary to ensure its success. The module is based around 60 learning hours, but this is only a guide. The scheme below occupied 60 learning hours with the event for the project undertaken outside that allowance. Centres may decide to reduce the learning hours to incorporate running a simulated event within the 60 learning hours and work towards the final project event being incorporated within the 60 learning hours. Nb. each session approx. 3 hours study

What is assessed in this module?

Students will need to show understanding of the theory of the module by an assignment or project illustrating how they planned, promoted and evaluated an event. The event must take place and the candidates must play a major role in its operation. The assignment should cover the whole range of the Assessment Objectives in the syllabus and show evidence of knowledge and understanding of these by the staging of an event which evidences the following criteria:

1.0   Understand the aim of event planning
    1.1   Organise and plan an event
    1.2   Define the key processes involved in staging an event
2.0   Demonstrate an understanding of the use of different printed materials
    2.1   describe the effectiveness of different types of printed material
    2.2   Identify the purpose of advertising in promoting events
3.0   Demonstrate the importance of selling skills in event promotion
    3.1   Explain the importance of personal contact
    3.2   Explain the significance of dress code and images
    3.3   Demonstrate the 3 A's of Attitude, Appearance and Acknowledgement
4.0   Demonstrate an awareness of the need for evaluation
    4.1   Identify methods of evaluation
    4.2   Gather information for evaluation
    4.3   Use the information to provide an evaluation of the event
5.0   Produce a report to the specified criteria
    5.1   Organise an event
    5.2   Produce an individual written report

The assignment should clearly indicate
- the purpose of the event and the planning undertaken to stage the event
- the effectiveness of printed materials in relation to the promotion of the event and some measurement of their effectiveness in promotion
- show understanding of the role of the brochure in promoting events and selling products and/or services
- identify the benefits of advertising and promoting the travel and tourism event, with examples of materials used
- describe the selling skills needed when promoting travel and tourism events and the importance of dress and body language
- review and evaluate the event identifying and including the evaluation techniques to be used, the analysis of the data collected, and the presentation of the results of the evaluation

The assignment should be tailored to the individual candidate, according to their situation, facilities and time available and the needs of candidates undertaking this module. Where possible the event should relate to their job role or function if in employment.

Resources for this module

- local or national business directories identifying event locations (e.g. conference centres, halls, hotels with conference/event facilities etc)
- planning charts or use of spreadsheet software
- brochures and conference packs used by event facilities to promote events
- plans of venues used for events, giving dimensions, facilities available etc
- local tourist information guides
- newspapers (with articles concerning travel and entertainment sections, local travel fairs, promotions)
- calculators (for dimensions, costs)
- local health and safety regulations

Underpinning knowledge

It is recommended that students have knowledge from the Core Module to cover

- objectives of travel and tourism development in terms of attracting visitors, increasing visitor spending, increasing assets in local area
- benefits of travel and tourism development in relation to economic, social and cultural terms (e.g. economic development of area, employment, revitalisation of traditions, festivals)
- maximising visitor spending, tourism training, accessibility and customer service skills
- role of national and foreign organisations and communication organisations in tourism development
- importance of marketing and promotional activities to increase customer awareness, stimulate demand and use of incentives
- advantages and disadvantages of marketing communication methods (advertisements, direct marketing, public relations, sales promotion, personal selling)
- role and effectiveness of different marketing strategies
- reasons for demands of incoming and domestic tourists
- roles of all sectors in destination management and stimulating travel and tourism business

General principles and procedures

- accuracy in selecting and extracting appropriate information
- ability to select and apply acquired information to situation/project/event
- encourage students to share information and data when working in a team to develop and plan an event
- develop confidence in using internet and information sources to obtain relevant information
- develop confidence in dealing with external information sources to plan and manage event (e.g. facility managers, government departments, customers)
- integrate co-operation skills when working as a team or with others to plan and manage the event
- devise suitable evaluation tools and apply numerical procedures to analyse findings

Scheme of Work

Section A: Event Planning

Assessment Objective A1: Understand and explain key aims and objectives when planning an event in the travel and tourism industry

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan One			
• identify types of events (b)	• brainstorm – could be in groups or whole class - types of events they are familiar with – list all initially then group by international, national, local. Consider events e.g. Olympic Games, world travel market, film festivals, national conferences or conventions, exhibitions, trade fairs, concerts, regional local exhibitions, opening of new tourist facility, corporate events, promotional event for specific tourist destination, fund raising events. Consolidate ideas on flipchart and add any not given by students from above list. Then get students to group these by type, e.g. exhibition, conference, entertainment, trade fair, seminar, meeting, award ceremony, gala dinner and add any other ideas to types of event arising from discussion	• flipchart • newspapers/travel articles	
• types of events (b)	• teacher to explain and outline differences in events. Make table with six columns. Head each column as follows: Type of Event, Internally or Externally Organised, Target Market, Scale, Type of Venue, Cost to Run, Planning Time. Under Type of Event, list: Exhibition, Trade Fair, Festival (e.g. Music, Film), Conference, Meeting, Seminar, Concert, Promotional Event, Charity Fun Run, Hotel/Restaurant Opening. Then get students to complete table, filling in the relevant information for each type of event, e.g. Exhibition: externally organised/new and existing customers/large/ exhibition hall(s)/very expensive to stage/up to two years		

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Two			
• aims of events (a)	• using table produced above, divide class into groups or pairs, and each takes one of the types of event in the first column. Discuss aims and objectives of that event. Was it aimed to - increase awareness of product or place - present favourable image of place/product/organisation - increase sales/profitability - provide benefits to other organisations or communities, groups - celebrate achievement • to develop understanding of planning an event realistically, use an event in local area as an example, as the basis for discussion/activity throughout this module. Students could undertake learning activities for this module by simulating a tour operator launching a new destination and brochure to travel agencies, or a college organising a conference on travel and tourism for other schools and colleges in the area. Identify – aims, objectives, methods used to achieve aims and objectives for the chosen activity. Guide students to consider: - specific - accurately target groups and be accountable - measurable in order that progress can be monitored - agreed by all team members and minuted/recorded - realistic for all team to believe in - timed targets need to be set, monitored and stuck to		

Assessment Objective A2: Describe the key processes involved in staging a successful event

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Three			
• event venues (a)	• using table from session two, identify possible venues in area (local and national). Each student researches one and identifies size, cost of hire, number of possible participants, equipment available, booking time needed for availability (time scale involved). Then (s)he gives presentation to rest of group on findings. Assess suitability of venues for different activities identified in session one as group	• directories of local businesses/venues/hotels • brochures • telephone for enquiries • OHT for presentations	
Session Plan Four			
• visit to local event venue (a)	• arrange visit to local event venue and get Events Manager/Organiser to give presentation to students on their role and the operation of the venue. Presentation needs to cover identifying organisation needs (e.g. time scale, resources, skills needed, types of events they cater for, need for liaison with participants). Students prepare questions with teacher guidance to ask about staging an event/possible room layout/equipment • or arrange visit as a group of students to trade fair/exhibition locally to identify constraints, needs of exhibitors, access, resources. Students could prepare a checklist of areas to investigate during visit for classroom discussion on return	• local event venue could be large arena, hotel with banqueting/conference facilities etc. • checklist or questionnaire to ask participants, exhibitors, staff, etc.	

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Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Five			
• planning, deadlines and targets (b)	• use findings from visits/speaker to relate to own simulated event which is being used as theme for this unit. Discuss venues in area, suitability, materials and equipment needed, planning required. For simulated event, select suitable venue and justify reasons for selection. List all features which need to be identified, clarified and organised. See Appendix 1 for suggestions		
Session Plan Six			
• planning schedules (b)	• discuss planning schedules and format by identifying targets, features, using example critical path analysis (Appendix 2) sheet. Organise a schedule with deadlines for simulated event by which details must be set. Use a spreadsheet, GANTT chart or table as examples in Appendix 2 to define: Action By whom By when • discuss time scale, planning schedules as on Appendix 2 and decide which suits simulated project or students better as an operative model. Compare your schedule with a colleague to see if you have identified all features – add any not included and prepare a detailed action plan for the event with clear deadlines and target dates	• Appendix 2 – critical path analysis and suggested planning schedule layouts	

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Seven			
• resources for the event: managing finance (c)	• students need to consider simple finance needed for the event and how this is to be recorded. They should understand start-up costs, budgeting, estimating income, cash handling and recording. Practice with simple income and expenditure accounts to calculate profit/loss and obtain balances • more practical work can be undertaken using simulated event as example - Tour Operator budget of 10,000 - identify costs (venue, food, equipment, promotional materials/display/prizes etc, staff costs, equipment (laptop, video, film, power supply), invitations printing & postage – figures can be theoretical for planning purposes but need to be actual for final plan – prepare possible estimated income and expenditure account and balance sheet for simulated event • identify possible income and decide how best to keep records of expenditure. Consider cash handling required and security measures (e.g. banking) etc.	• income and expenditure accounts from simple business textbooks for exercises • budget sheets or spreadsheet programmes on computer • calculators • receipt forms • accounting paper or file paper rules up to simulate • accounting paper • teacher could obtain finance details from an actual event (may be one held in centre) or use case study material to explain and exemplify processes	

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Eight			
• staffing for event (c)	• students need to understand the various <u>roles</u> for managing an event, such as managing, administration, financial recording, advertising and promotion, and be able to identify the skills and abilities needed by those undertaking those functions. They could start by brainstorming on the types of organising staff needed, after which they could make a table with three columns - Role, Function, Skills • they need to consider if additional staffing is needed on the day of the event, and what types/number would be required, using Appendix 1 as a guide • to help analyse their own abilities/skills to fit any of the functions, they could undertake the Belbin Personality Types test (Appendix 3), or they could undertake some form of self-analysis using a personality chart and get a colleague to prepare one as to how they see them, and compare the two, discussing skills and abilities. Having analysed own skills, discuss functions/roles for simulated event according to personality types	• Appendix 1 checklist Belbins Personality Types analysis sheets • Appendix 3 Personality/Skills analysis sheets as used by careers advisors	

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Nine			
• resources for events - restraints -legal, health, safety, security, etc. (d)	• teacher to explain the terms legal, health, safety, etc. then students identify any legal, health, safety, security, environmental restraints concerning their simulated event and any other event used for discussion purposes. Also consider how one event can disrupt other activities (availability of staff, noise, access etc). Take each restraint in turn and identify implication for the planned activity. Examples could be: legal age for alcohol and insurance of equipment, participants, public liability; health and safety – numbers allowed in venue, safety of electrical equipment/features, food hygiene, safety to public and participants; security – equipment, belongings; environment – litter, noise, refuse disposal • one approach could be to invite Health and Safety Officer from school/college/hotel venue to class to discuss health and safety issues for event. Use a prepared Risk Assessment Form (such as may be used in centre for trips/activities/visits) as guide for discussion before devising risk assessment form as a group suitable for the simulated/planned event. Consider broader health and safety issues if simulated event does not cover all requirements of syllabus	• Health and Safety regulations for venue/locality • Health and Safety checklist and risk assessment form - could use Appendix 1 as guide	

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Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Ten and Eleven			
• understanding and preparing a business plan for the event	• invite representative from local bank to make presentation to group on preparing business plans and types of information which should be included • if they are prepared to stay, ask them to help students to prepare a business plan suitable for their simulated event. This must include aims and objectives of event, customers needs and how these will be met, how the project will be marketed, physical resources needed (e.g. equipment, venue/premises, materials), financial aspects (budget, start-up costs, income, cash handling procedures, security etc), staffing for the project, administration systems (recording decisions/meetings, booking systems, record keeping, paper based or electronic), project time scales, and any legal aspects (health, safety, security, insurance, liability for staff and public)	• business start-up packs from local banks • draft business plans	

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Twelve and Thirteen			
• reasons for evaluation of events (e)	• students should understand purposes of evaluation, not only of event, but also of personal performance. They also need to consider whether evaluation should be ongoing (i.e. checking action plan and progress to meet targets and whether the identified function is being carried out appropriately and effectively) or just at end of event. This could be by group discussion. Once the purposes for evaluation have been discussed fully, students then need to consider the method to be used for evaluation and with whom • they need to understand the purposes of feedback and the best way to obtain the results to make an analysis – questionnaires, interview or face-to-face discussion, response cards, attendance figures. Are they to obtain feedback from participants, team members, other staff, visitors, and what is the best method for each group. Responses needed to questions such as what worked well, why, what didn't work well and why, were roles allocated suitably, was attendance satisfactory, were customers satisfied, was the event value for money etc. Once discussion taken place, the necessary evaluation documents need to be prepared, with consideration being given as to how they are to be analysed – will the analysis be quantitative (countable) or qualitative (views and opinions expressed)	• examples of evaluation forms for events/hotel questionnaires/customer feedback forms/delegate feedback forms for conferences or meetings, ideal as discussion tools and guidance for types of questions to be asked	

Section B: Promotional Techniques

Assessment Objective B1: Describe the main types of printed material and their effectiveness when used for promoting travel and tourism events

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Fourteen			
• promotional techniques used for events (b)	• review types of promotional techniques studied in Marketing Core. Cover brochures, leaflets, flyers, posters, price lists, guides, sponsorship, advertising, direct mail. As a group decide which types would be needed for the simulated event and what details should be included. Consider the numbers of the different types of promotional material needed – how many flyers, brochures etc. Decide who should design/produce them and costs – ring printers to obtain estimations of costs • prepare promotional materials in draft form, e.g. brochure, price list, letter to prospective participants, posters. Ensure all details are present such as contact names, telephone numbers, purpose of event, date, time, location etc.	• examples of promotional material from venues, organisations • newspapers for press releases and PR materials • directories of printers for telephone contact • materials for preparation of draft posters, brochures, etc.	• details to include must be date, venue, contact details, purpose of event. Consider AIDA principles in preparation of materials

Assessment Objective B2: Understand the role of the brochure in promoting events and destinations

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Fifteen			
• role of brochure and its effectiveness (a)	• discuss various brochures obtained from venues, events, and decide what are the features of these and the purposes – inform, advise, promote, secondary selling techniques (complimentary products). Students could be divided into groups to prepare a presentation on their findings to give to rest of group. Should cover analysis of brochures, function, importance of information given and what is included in the brochure – e.g. lead times, prices, any legal considerations (accuracy of information etc.) and selling techniques being used by brochure provider	• brochures and promotional material as in session 14	

Assessment Objective B3: Identify the benefits of advertising and promoting travel and tourism events

Session Plan Sixteen			
	• role of advertising and promotion (a)	• students need to appreciate the costs of producing advertising materials and how this will affect their budget and relate to the business plan. They should outline the features of poster, leaflet, direct mail shot, press releases and relate this to the anticipated audience and target market, considering the costs and the benefits of each. They need to consider advertising and promotion in relation to the aims of the event	• promotional materials and brochures as in session 14	

Section C: Event Promotion

Assessment Objective C1: Describe the importance of selling skills when promoting travel and tourism events or services

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Seventeen			

• importance of selling skills (a) and (c)	• teacher input on communication skills/body language/importance of 3A's (attitude/appearance/acknowledgement)
	
	• practice through role play communication skills in various situations – working in pairs with one as customer, one as consultant/employee. Could be situations such as
	  a) help desk at a TIC or travel agency – giving advice
	  b) explaining features of a product, e.g. package holiday covering all details, dealing with questions to sell product – making it attractive
	  c) customer complaints or problem handling
	  d) responding to telephone enquiries
	
	• video situations and discuss outcomes re body language, technical terminology used and explained, clarity, selling technique, to analyse each individual's performance and suggest improvements. Consider 3A's in performance – attitude, appearance, acknowledgement
		• video camera to record role plays, replay those for discussion
		
		• scenarios or outlines of situations students will use	

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Eighteen			
• importance of corporate image through dress, uniform (b)	• group discussion or brainstorm on reasons for corporate image to be maintained – how to achieve it through uniform/badges/logos etc. • consider dress code for event – relate this to major events in recent press (Olympic Games, Commonwealth Games) or to corporate image created by airlines, travel agencies etc. Identify dress code, logo, image portrayed – was it effective, did it meet the needs of spectators or customers, purpose of image • decide corporate image to be used for own event, design logo, consider uniform/dress code to be used	• photographs of organisation uniforms, logos, badges used	

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Session Plan Nineteen			
• running simulated event (sections A, B and C)	• undertake simulated event to see how all learning relates to function of event, with students fulfilling roles as planned		

Session Plan Twenty			
• event evaluation (section D)	• processes of evaluation have already been covered in sessions 12 and 13, but students need to relate this underpinning knowledge to the actual event they are simulating by devising suitable review systems and preparing documentation to be used for event evaluation such as questionnaires, comment cards etc. Consider formal/informal evaluative techniques • analyse responses to the questionnaires and response cards, telephone calls. Consider independently how event could be improved, including their own performance, and make presentation to rest of group. This should include comments on the planning processes, promotion for the event	• responses to evaluation such as questionnaires, comment cards, notes of telephone calls, attendance figures • graph paper for analysis • overhead transparency sheets for presentations	

Learning objectives	Classroom Ideas	Resources	Notes
Session Plan Twenty One Onwards			
• preparation of own event for assignment	• students work, with guidance from teacher initially, on own event and preparation for this, taking account of all the learning undertaken in the module • presentation of completed project for submission to CIE for examination. Use checklist on page one of these online materials to ensure all content is present, and present project with index identifying page where evidence is to be found		

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RESOURCES

Ann Rowe, John D Smith and Fiona Borein, Career Award Travel and Tourism Standard Level, Cambridge University Press, 521 89235 X

R Youell, Advanced GNVQ Optional Units Travel and Tourism, Longman, 0582 29337 5

R Youell, Vocational A-Level Travel and Tourism, Longman, 0582 40445-2

ABTA's Guide to Working in Travel 1995, (available from Travel Training Company, The Cornerstone, The Broadway, Woking, Surrey GU21 5AR; Tel 01483 727321, Fax 01483 756698)

ABTA's Top 20 Tour Operators 1995, ABTA's Top 20 Travel Agents 1995, (available from ABTA, 55-7 Newman Street, London, W1P 4AH, Tel: (020) 7637 2444, Fax (020) 7637 0713)

Burton Rosemary, Travel Geography (1995) Pitman Publishing

Horner, Pauline, Travel Geography for Tourism, Stanley Thornes Publishers

Travel Education Project@ Learner's Pack; Resource Material (1998) - http://www.travelchannel.co.uk

World Travel Atlas, Columbus Press (email - booksales@colguide.demon.co.uk; http://www.travelknowledge.com)

World Travel Dictionary, Columbus Press (as above)

World Travel Guide, Columbus Press (as above)

Useful Web Pages

World Tourism Organisation: www.wto.org

Airlines:

American Airlines: www.aa.com

Continental Airlines: www.flycontinental.com

British Airways: www.british-airways.com

Garuda Indonesia: www.aerowisata.com/garuda

Lufthansa: http://www.lufthansa.com/index_en.html

Quantas: www.quantas.com.au

Singapore Airlines: www.singaporeair.com

Virgin Atlantic: www.virgin-atlantic.com

Air Travel General Resources

Worldwide Airport and City Code Database: http://www.cowtown.net/

www.xtremepapers.net

Round-the-World Travel Guide – Airlines www.travel-library.com/rtw/html/rtwairlines.html

Air Transport Association: www.air-transport.org

Federal Aviation Administration (USA): www.faa.gov

International Air Transport Association (IATA): www.iata.org

International Civil Aviation Organisation (ICAO): www.icao.int

Business Travel

Biztravel.com: http://www.biztravel.com/

SkyGuide: www.sky-guide.com

Guidebooks online

Fodor's Travel Online: www.fodors.com

Lonely Planet Online: www.lonelyplanet.com

Michelin Travel: www.michelin-travel.com

Health (Travel)

Healthlink Travel Medicine: healthlink.mcw.edu/travel-medicine

International Society of Travel Medicine: www.istm.org

Travel Health Online: http://www.tripprep.com/

Maps

Excite Maps: maps.excite.com

MapQuest!: www.mapquest.com

World City Maps www.lib.utexas.edu/Libs/PCL/Map_collection/world_cities.html

Online Travel Magazines

ABCNEWS.com Travel Index: abcnews.go.com/sections/travel/

Leisure Travel News: www.ttgweb.com

Travel & Leisure: www.travelandleisure.com

Rail Travel

Amtrak (USA): www.amtrak.com

Eurostar: www.railpass.com/eurostar

Rail Europe: www.raileurope.com

Japanese Bullet Trains: http://www.japan-guide.com/e/e2018.html

Time Converters, Time Zones, Weather

Time Zone Converter: www.timezoneconverter.com

World Time Locations: www.isbister.com/worldtime/wt-location.html

Weather Channel: www.weather.com/homepage.html

BBC Online: www.bbc.co.uk/weather

Tourist Bureaux and Destination Information

BTA's Visit Britain: www.visitbritain.com

Caribbean Hotel and Resort Guide: www.where2stay.com/islands

Mexico Online: www.mexonline.com

ConventionsBureaus.com (USA): www.conventionbureaus.com

International Tourist Bureaus: http://www.armchair.com/travel/travel.html

International Tourist Offices: http://www.tvlon.com/

Appendix 1

Event Planning Checklist

FACILITIES FOR EVENTS		TICK	INITIAL BY WHOM	DATE BY WHEN
1	Venue			
2	Alternative venue, contingency plan etc			
3	Car parks			
4	Disabled access			
5	First aid points			
6	Toilet facilities			
7	Power points			
8	Safety provision, fire extinguishers, smoke alarms, etc			
9	Seating and table layout			
10	Signposting			
11	Special restrictions (overhead cables etc)			
Staffing				
12	Announcer			
13	Barman			
14	Car park attendants			
15	Caterers			
16	Cleaners			
17	Medical cover (eg St Johns Ambulance)			
18	Maintenance staff			
19	Responsible for guests			
20	Security guards			
21	Technicians			
22	Volunteer helpers			
Administration and Finance				
23	Accounting			
24	Admissions or entry fees			
25	Fund raising			
26	Donations			
27	Insurance cover			
28	Invitations			
29	Licensing for bar etc			
30	Postage and printing			
31	Programmes, brochures, printing & sales			
32	Sales			
33	Signs			
34	Tickets/invites			
Equipment				
35	Chairs and tables			
36	Communications, radios etc			
37	Decorations, flowers etc			
38	Staging			
39	Display boards			
40	Lighting			
41	Litter bins			
42	Sound system, PA and music, etc			
43	Uniforms			
Presentation and Media				
44	Advertising and artwork			
45	Badges and banners			
46	Announcer			

47	Video and photography			
48	Corporate logo			
49	Marketing, press releases			
50	Newsletter, posters, leaflets			
51	Publicity and public relations			
52	Radio and television (if relevant)			
53	VIPs (important guests)			
Support Services				
54	Accommodation			
55	Bar and catering			
56	Disabled support services			
57	Emergency support, fire, police, ambulance			
58	Health and safety			
59	Lost property			
60	Photocopier			
61	Security of people and property			
62	Tourist information, local maps, etc			

Appendix 2

CRITICAL PATH ANALYSIS AND TIME SCALE CHART
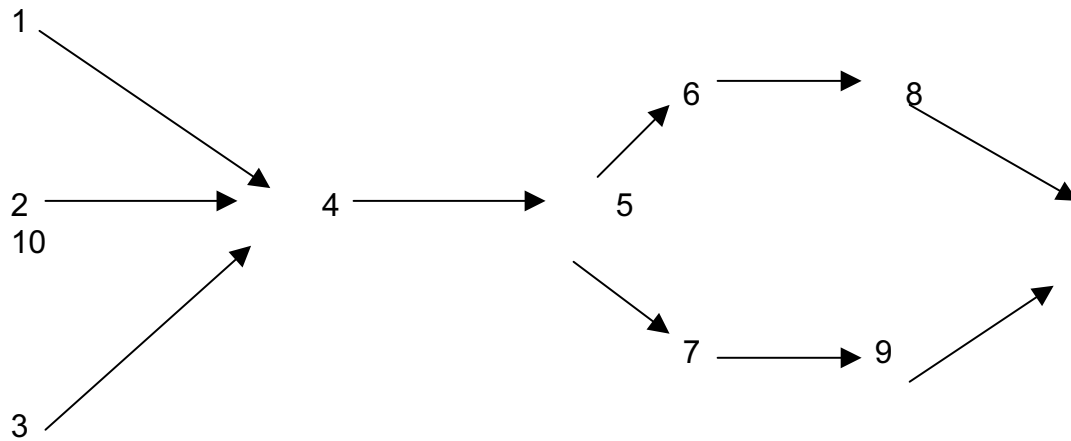
KEY:
1 Cost of printing
2 Design poster
3 Prepare proofs
4 Printing
5 Mailshot
6 Receive bookings
7 Confirm bookings
8 Additional mailshot
9 Process extra bookings
10 Final event

An Example Project Time Scale

Tasks	March 1-----------------31	April 1-----------------30	May 1-------------------31
1			
2			
3			
4			
5			
6			

Etc

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Calendar Style Timetable

WEEK	MON	TUES	WED	THUR	FRI	SAT	SUN
1	First team meeting		Aims & objectives decided		Roles decided		
2		Business plan prepared		Second team meeting	Marketing commences		
3	Third team meeting		Bookings confirmed		Publicity prepared		
4	Additional mailshot			Fourth team meeting			
5		Final checks					
6	Project starts				Project ends		
7	Evaluation Undertaken						
8	Reports and evaluation presentations		Assignment prepared and completed				

Bar Chart or Spreadsheet Planning Tool

TASK	Week ending (Friday)										
	8 Mar	15 Mar	22 Mar	29 Mar	5 Apl	15 Apl	19 Apl	26 Apl	3 May	10 May	17 May
Agree plan for event	▓	▓									
Book venue, speakers			▓	▓							
Prepare publicity					▓						
Allocate materials and resources						▓	▓				
Agree contingencies							▓	▓			
Check arrangements								▓	▓		
Liaise with exhibitors	▓	▓			▓	▓			▓	▓	
Final press releases									▓		
Stage event										▓	
Gather and evaluate data										▓	▓

APPENDIX 3

Belbin's Team Types

TYPE	TYPICAL FEATURES	POSITIVE QUALITIES	ALLOWABLE WEAKNESSES
COORDINATOR (CO)	Calm, self-confident and self-controlled	Welcomes all positive contributions and considers them on their merits. Feels strongly about meeting objectives	No major weaknesses
SHAPER (SH)	Enthusiastic, outgoing and dynamic	Lots of drive and a readiness to 'have a go'	Can be impatient and irritable
PLANT (PL)	An individual, often serious and sometimes a little different	Genius, imagination and a good knowledge	Doesn't think about practicalities or protocol
MONITOR EVALUATOR (ME)	Careful, unemotional and sometimes bland	Judgement, discretion and occasional stubbornness	Lacks personal inspiration or ability to motivate others
RESOURCE INVESTIGATOR (RI)	Extrovert, enthusiastic and a good communicator	Good at networking (working with people). Ability to respond to a challenge	Loses interest once initial fascination has passed
IMPLEMENTER (IM)	Predictable, well-meaning	Practical common-sense, hard working and has good self-discipline	Can be very inflexible and hard to convince of new ideas
TEAM WORKER (TW)	Team player, sensitive and patient	Good for team spirit, ability to respond to people and situations	Indecisiveness when put under pressure
FINISHER (F)	Always prepared, checks everything, very conscientious	A perfectionist, right to the end	Tendency to worry about nothing. Sometimes finds it hard to actually trust others

The following test will give you an opportunity to find out where you fit in Belbin's team model. You will need between 20 and 30 minutes of full concentration to complete the exercise effectively.

For each exercise tick in the far left-hand column the one, two or three sentences which most apply to you. Then in the column on the right, allocate 10 points across those sentences you have ticked which will indicate to what extent each applies to you. If there are only two sentences in each section which sums you up well, then allocate the 10 points giving more to the one which would be your first choice and less to your second choice. If each statement applies equally, divide the points accordingly, but keep to whole numbers. You <u>must</u> allocate all ten points in each section.

SECTION A: When involved in a project with other people:		
TICK		**POINTS**
	1. I can be relied upon to see that work that needs to be done is organised	
	2. I notice when other people make mistakes, or forget things	
	3. I react strongly when meetings look like going off the point and away from the main objectives	
	4. I come up with original suggestions and ideas	
	5. I analyse other people's ideas, and can see the relevant strengths and weaknesses	

TICK		POINTS
	6. I am keen to find out about the latest ideas and developments	
	7. I am good at organising other people	
	8. I am always ready to support good suggestions and help to resolve problems	

SECTION B: In seeking satisfaction through my work:

TICK		POINTS
	1. I like to have a strong influence on decision making	
	2. I really enjoy work that requires a lot of concentration and attention	
	3. I am willing to help other team members with their problems	
	4. I enjoy looking at all the alternatives available	
	5. I tend to have a creative approach to solving problems	
	6. I enjoy listening to and bringing together different points of view	
	7. I am happier working in a proven way than experimenting with new ideas	
	8. I particularly enjoy listening to different views and trying different techniques	

SECTION C: When the team is trying to solve a particularly tricky problem:

TICK		POINTS
	1. I look out for areas where difficulties may arise	
	2. I look at the whole project and see where this particular problem fits in with the overall action plan	
	3. I like to go through all the options before making up my mind	
	4. I can listen to and bring together other people's skills and talents	
	5. I stick to my steady approach, and don't really feel the pressure	
	6. I often come up with a new idea to solve a long-term problem	
	7. I am ready to make my personal views known in a forceful way if necessary	
	8. I am ready to help wherever I can	

SECTION D: In carrying out my day-to-day work:

TICK		POINTS
	1. I am happiest when my tasks and objectives are quite clear	
	2. I am happy to emphasise my own point of view in meetings and make my views and ideas known	
	3. I can work with anybody, as long as they have got something worthwhile to contribute and say	
	4. I make a point of following up interesting ideas and people	
	5. I can usually find the argument to prove when unworkable proposals are not worth pursuing	
	6. I can see how things fit together when other people often can't	
	7. I get real satisfaction from being busy	
	8. I have a quiet interest in getting to know people better	

SECTION E: If I am suddenly given a difficult task with limited time and unfamiliar people:

TICK		POINTS
	1. I would prefer to work on my own as I find myself frustrated in these situations	
	2. I find my personal skills with others can have the effect of the whole team reaching agreement	
	3. I find that my judgement isn't affected by my feelings and I just get on with the task accepting the challenge	
	4. I try to build up an effective team structure within the given constraints	
	5. I can work with most people regardless of their personal qualities and views	
	6. I don't mind being a little unpopular if it means that I get my views across to the rest of the team	

	7. I can usually find someone with specialist knowledge and skills to help out	
	8. I seem to develop a natural sense of urgency	

SECTION F: When suddenly asked to consider a new project:

TICK		POINTS
	1. I immediately start to look around for possible ideas	
	2. Before I start I feel I must finish my current work or project	
	3. I carefully analyse the project in a careful way	
	4. If necessary I can assert myself to get other people involved	
	5. I can give a personal, and often different, view of most projects	
	6. I am happy to take the lead, if that is what is required	
	7. I can work well with the rest of my team and am happy to work on any of their ideas	
	8. I need to know clearly the aims and objectives of a project if I am to give it 100% effort	

SECTION G: In contributing to group projects in general:

TICK		POINTS
	1. I feel happy to produce an action plan once I have been given an overview of the project	
	2. I may not make the fastest decisions but I feel they are worth waiting for	
	3. I use a lot of personal contacts and friends to get the project completed	
	4. I have an eye for getting the details just right	
	5. I try to make my mark in group meetings and am never short of something to say	
	6. I can see how new ideas can develop in building a successful team	
	7. I see both sides of a problem and then try to take a decision that is acceptable to all	
	8. I get on well with others and work hard for the benefit of the whole team	

When you have completed each of the 7 sections you should transfer your scores to this blank matrix. For example, if in Section A you ticked statements 3 and 6 and gave 6 points to statement 3 and 4 points to statement 6, then you should put a 6 on the dotted line next to the 3 statement and put 4 next to the 6 statement, such as in the example below in bold. Add up the total of each column, and ensure the final total for the table is 70. This shows you have answered all the seven sections.

Team type	CO	SH	PL	ME	RI	IM	TW	F
Section								
A	7 …..	3 ..**6**	4 …..	5 …..	6 ..**4**..	1 …..	8 …..	2 …..
B	6 …..	1 …..	5 …..	4 …..	8 …..	7 …..	3 …..	2 …..
C	4 …..	7 …..	6 …..	3 …..	2 …..	5 …..	8 …..	1 …..
D	3 …..	2 …..	6 …..	5 …..	4 …..	1 …..	8 …..	7 …..
E	5 …..	6 …..	1 …..	3 …..	7 …..	4 …..	2 …..	8 …..
F	4 …..	6 …..	5 …..	3 …..	1 …..	8 …..	7 …..	2 …..
G	7 …..	5 …..	6 …..	2 …..	3 …..	1 …..	8 …..	4 …..