

Title	Formulate and establish a visitor event or series		
Level	5	Credits	20

Purpose	People credited with this unit standard are able to: research and formulate; plan; establish; and evaluate, a visitor event or series.
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Classification	Tourism > Visitor Services
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Available grade	Achieved
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Explanatory notes

1 Definitions

Tourism workplace refers to any organisation involved in the domestic tourism industry, the inbound tourism industry, or the outbound tourism industry. Tourism workplaces may include but are not limited to – transport operators, accommodation providers, attraction and activity operators, food and beverage establishments, visitor information centres, travel retailers, travel wholesalers.

Tourism workplace policies and procedures refer to documented instructions about workplace expectations. These may include but are not limited to – customer service delivery, personal presentation, legislation, organisational structure, business objectives.

A *visitor event* could be a cultural, tourism, or similar occasion or happening which requires special purpose planning and management and which aims to attract visitors.

- 2 Any relevant Acts, regulations, and bylaws must be complied with during assessment against this standard.

Outcomes and evidence requirements

Outcome 1

Research and formulate a visitor event or series.

Evidence requirements

- 1.1 Components of event or series are identified, and availability of event or series is confirmed.

Range number, type, location(s), design, participants, visitor appeal, ancillary services, concessions.

- 1.2 Viability criteria are established in terms of acceptable risk limits.
Range components, costs, time, resources.
- 1.3 Market demand is estimated and checked against viability criteria.
Range visitor sources, numbers, revenue, market position, competition, development, sponsorship, promotion.
- 1.4 Establishment costs are estimated and checked against viability criteria.
Range capital, operational costs, timescale, cost and revenue sharing.

Outcome 2

Plan the visitor event or series.

Evidence requirements

- 2.1 An establishment plan is drawn up in accordance with tourism workplace policies and procedures.
- 2.2 Establishment planning confirms the viability of the location(s).
Range may include but is not limited to – access, transport, climate, availability, capacity, legal, requirements, resource management approval, other agencies.
- 2.3 Establishment plan includes methods and provisions for building relationships with stakeholders.
Range may include but is not limited to – meetings, direct mail, e-mail, greeting cards, phone calls.
- 2.4 Establishment planning confirms the resources are identified to meet the requirements of the event or series.
Range consents, equipment, personnel, supplies, marketing, other agencies.
- 2.5 Establishment planning confirms the cost estimates meet economic viability criteria.
Range capital, operational costs, recurrent expenses, development.
- 2.6 Establishment planning confirms funding arrangements meet budgetary viability criteria.
Range capital, operational costs, revenue, repayment, pricing, marketing, sponsorship, revenue sharing.

Outcome 3

Establish the visitor event or series.

Evidence requirements

- 3.1 Funds are obtained as specified in the establishment plan and in accordance with tourism workplace policies and procedures.
- Range capital, operational funds.
- 3.2 Consents are obtained from associated agencies in accordance with establishment plan and legislative requirements.
- Range participants, concessionaires, regulatory bodies, ancillary services.
- 3.3 Service providers and suppliers are commissioned in accordance with the establishment plan and tourism workplace policies and procedures.
- Range design, legal services, financial services, construction, installation, recruitment, marketing.
- 3.4 Establishment of the visitor event or series is coordinated in accordance with establishment plan and tourism workplace policies and procedures.
- Range timeframe, cost, contracts, review, modification.

Outcome 4

Evaluate the visitor event or series.

Evidence requirements

- 4.1 Reports on execution and outcomes of the event or series are completed in accordance with tourism workplace policies and procedures.
- Range planning, management, coordination, strengths, weaknesses.
- 4.2 Identified issues are documented and remedial actions are recommended in accordance with tourism workplace policies and procedures.
- Range may include but is not limited to – action time, type, short and long term interests, reputation of event, participants, enterprise.
- 4.3 Planning, management, and coordination procedures are modified in accordance with tourism workplace policies and procedures.
- Range future performance, efficiency, return.

Planned review date	31 December 2021
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	13 December 1995	31 December 2018
Revision	2	10 April 1997	31 December 2018
Revision	3	3 February 1998	31 December 2018
Revision	4	20 April 2001	31 December 2018
Review	5	19 November 2010	31 December 2018
Review	6	16 March 2017	N/A

Consent and Moderation Requirements (CMR) reference	0078
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Please note

Providers must be granted consent to assess against standards (accredited) by NZQA, or an inter-institutional body with delegated authority for quality assurance, before they can report credits from assessment against unit standards or deliver courses of study leading to that assessment.

Industry Training Organisations must be granted consent to assess against standards by NZQA before they can register credits from assessment against unit standards.

Providers and Industry Training Organisations, which have been granted consent and which are assessing against unit standards must engage with the moderation system that applies to those standards.

Requirements for consent to assess and an outline of the moderation system that applies to this standard are outlined in the Consent and Moderation Requirements (CMRs). The CMR also includes useful information about special requirements for organisations wishing to develop education and training programmes, such as minimum qualifications for tutors and assessors, and special resource requirements.

Comments on this unit standard

Please contact ServicelQ qualifications@ServicelQ.org.nz if you wish to suggest changes to the content of this unit standard.