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**Cross-references**

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## Introduction

Your comments on this draft are welcome and will assist in the preparation of the consequent British Standard. If no comments are received to the contrary, this draft may be implemented unchanged as a British Standard.

## Submission

The guidance given below is intended to ensure that all comments receive efficient and appropriate attention by the responsible BSI committee. **Annotated drafts are not acceptable and will be rejected.**

All comments must be submitted, preferably electronically, to the Responsible Committee Secretary at the address given on the front cover. Comments should be compatible with Version 6.0 or Version 97 of Microsoft® Word for Windows™, if possible; otherwise comments in ASCII text format are acceptable. **Any comments not submitted electronically should still adhere to these format requirements.**

All comments submitted should be presented as given in the example below. Further information on submitting comments and how to obtain a blank electronic version of a comment form are available from the BSI web site at: [www.bsi-global.com/bs8901dpc](http://www.bsi-global.com/bs8901dpc)

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1	2	(3)	4	5	(6)	(7)
MB	Clause No./ Subclause No./ Annex (e.g. 3.1)	Paragraph/ Figure/Table/ Note (e.g. Table 1)	Type of comment	Comment (justification for change) by the MB	Proposed change by the MB	Secretariat observations on each comment submitted
	3.1	Definition 1	ed	Definition is ambiguous and needs clarifying.	Amend to read: '... so that the mains connector to which no connection ...'	
	6.4	Paragraph 2	te	The use of the UV photometer as an alternative cannot be supported as serious problems have been encountered in its use in the UK.	Delete reference to UV photometer.	

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**Sustainable event management system – Specification with guidance  
for use**

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## Foreword

### Publishing information

This British Standard was published by BSI and came into effect on XX Month 2007. It was prepared by Technical Committee SDS/1, *Sustainable development*. A list of organizations represented on this committee can be obtained on request to its secretary.

### Relationship with other publications

This standard is the first in a series of “daughter” standards of BS 8900, *Guidance for managing sustainable development*.

As a “derivative” of BS 8900, this standard has been written in such a way as to reflect the spirit of BS 8900. Consequently the principles described in the standard are designed to be compatible with BS 8900.

However, whereas BS 8900 has the broadest application to organizations and is independent of the nature of their activities, this standard focuses more specifically on organizations engaged in the event industry. This standard also shares common management system principles with the ISO 9000 and ISO 14000 series.

The following table shows the commonality between BS 8900, BS 8901, BS EN ISO 9001 and BS EN ISO 14001.

Standard	Application	Topic	Design element	Standard type
BS 8900	General	Sustainability	Sustainable development	Guide
BS 8901	Events only	Sustainability	Sustainable development	Management system specification
BS EN ISO 9001	General	Quality	Customer satisfaction	Management system specification
BS EN ISO 14001	General	Environment	Environmental impact	Management system specification

There is an important distinction between this standard and BS 8900. BS 8900 takes the form of guidance and recommendation but is not a specification to which compliance can be claimed (nor around which can a certification scheme be established) whereas, compliance to BS 8901 can be claimed by any organization that is involved in the delivery of an event subject to defining the organization’s role and scope of activities in the delivery of an event; and an evidence-based approach demonstrating that either:

- a) the requirements of the management system have been met; or
- b) the requirements of the contracting organization with overall responsibility for sustainable event management have been met.

### Presentational conventions

The provisions of this standard are presented in roman (i.e. upright) type. Its requirements are expressed in sentences in which the principal auxiliary verb is “shall”.

*Commentary, explanation and general informative material is presented in smaller italic type, and does not constitute a normative element.*

**Contractual and legal considerations**

This publication does not purport to include all the necessary provisions of a contract. Users are responsible for its correct application.

**Compliance with a British Standard cannot confer immunity from legal obligations.**

## 0 Introduction

### 0.1 General

Reflecting increased expectations by consumers and society in general, the events industry recognizes the need to conduct its business operations in a sustainable manner. There has been a move away from the perception of sustainability as a costly add-on to one where sustainability management is seen as the means to make better decisions, leading to more effective and higher-quality solutions.

As a “daughter” standard of BS 8900, this standard also takes sustainable development to mean:

*an enduring, balanced approach to economic activity, environmental responsibility and social progress.*

For the events industry the sustainability impacts associated with project-related activities will often fall outside of the scope of some familiar management systems, which aimed at managing core business demands. Consequently, there is a need for this sustainability focus, targeted at the impacts associated with event management, applicable to all projects and responsive to the key characteristics of the event.

### 0.2 Applicability

Events are temporary in nature, project-based and are made up of a series of stages as part of the event life cycle. There are several key characteristics that influence the success of the sustainable event management system.

- First, sustainability management of events should be an integral part of the event management process, and not regarded as an additional “add-on” component.
- Second, the management system should also be co-ordinated with the event life cycle stages, to ensure that important decisions/interventions are taken at appropriate points in the event stage/activity sequence, and the influence of the management system should extend throughout the entire supply chain.

This standard applies whether an organization is responsible for the overall management and coordination of the event, or a specialist supplier of products and services; whether the event is large or small; and whether the organization is responsible for an event once or repeatedly.

*NOTE There is no such things as a “one-off event”. Similar organizations will always have run similar events before and will run similar events again.*

### 0.3 Users

The delivery of an event might require the involvement of many organizations with a variety of roles and responsibilities, all of whom play some role in delivering a sustainable event. This standard meets the needs of all event management stakeholders, and is *proportional*; taking into account an organization or individual’s role and position in the supply chain, its size, capacity to adopt the system and ability to implement it.

The decision to undertake an event that conforms to the requirements of this standard frequently rests with the client and/or event organizer(s) since these organizations have control over the entire scope of activities of an event. Where compliance with this standard is central to the client’s and/or event organizer’s aspirations, the client

and/or event organizer(s) is responsible for implementing the sustainable event management system. Under these circumstances, suppliers other than the event organizer(s) can comply with the standard in their role as contributors to the management system, as required by the client and/or organizer(s) and defined by the supply chain arrangements, i.e. the tender specifications and conditions of contract.

However, where the client and/or event organizer does not stipulate a requirement for an event to conform to BS 8901, supplier organizations can meet the requirements of this standard within their own individual sphere of control (i.e. meeting the requirements and extending them to their suppliers).

#### **0.4 Control and influence**

The ability to control sustainability management of events is most apparent in the supply chain. However, where there are opportunities to influence stakeholders by other appropriate means, these are identified. For example, by changing behaviour as a result of raising awareness among the general public. Furthermore, the events industry needs to take note of and reflect increasing and changing expectations of visitors.

#### **0.5 Outcomes**

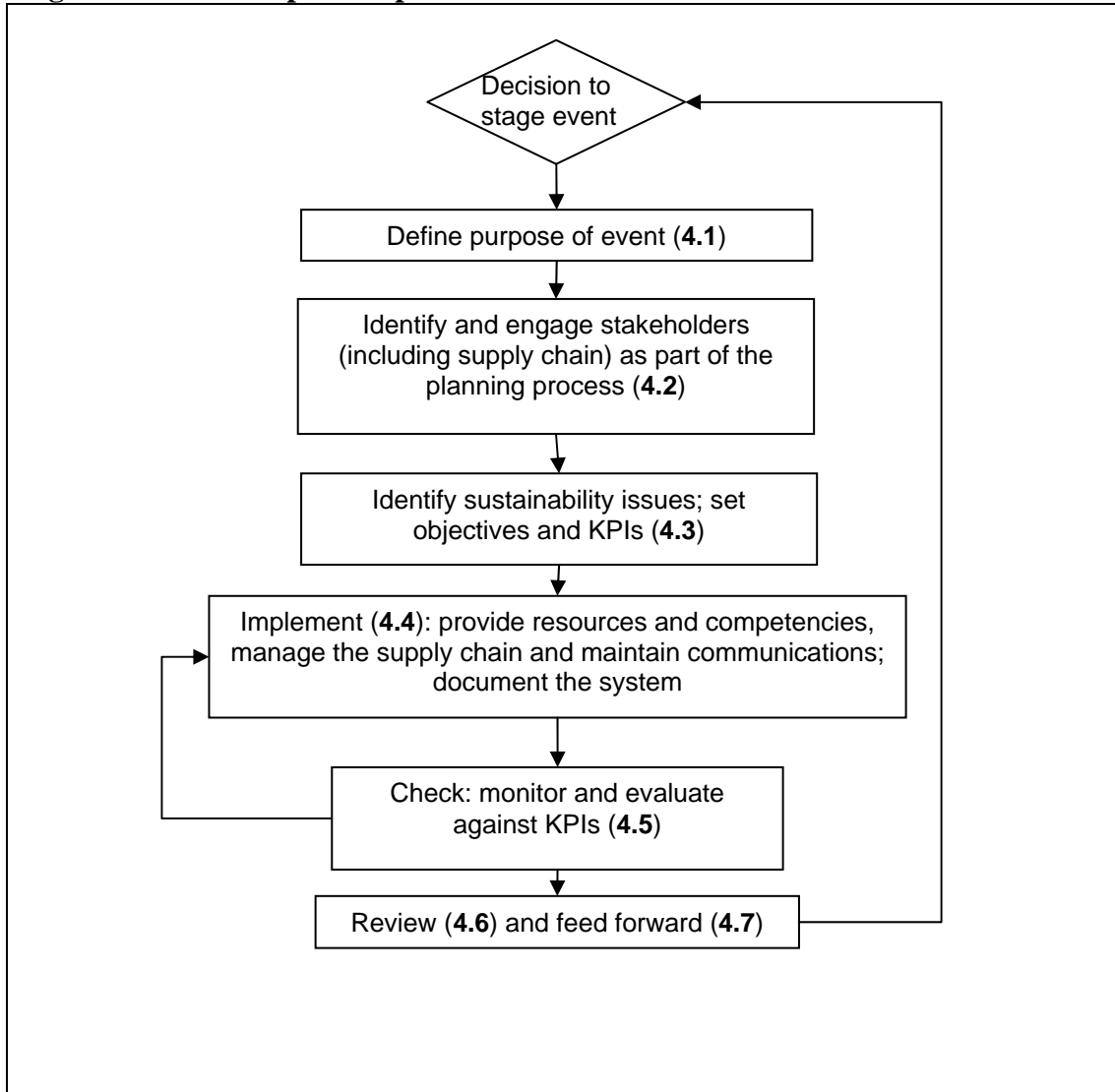
There is no single route to sustainable development and BS 8900, *Guidance for managing sustainable development*, proposes that organizations start by establishing the outcomes they are trying to achieve in sustainability terms. These might be defined as business benefits and may include:

- strengthening relationships;
- enhancing internal cohesion;
- developing trust and confidence;
- stimulating learning and innovation; and
- understanding and managing risks and opportunities.

#### **0.6 Implementation**

A declaration of the sustainability principles and values of the organization will set out the purpose of the event or their contribution to the event (**4.1**). These principles are informed by the organization's values and relate to commonly held ethical norms, and will normally include inclusivity, integrity, stewardship and transparency.

Following the steps in Clause 4 will then encourage continuous improvement of the quality of the management system and sustainability performance. Figure 1 provides a road map for implementing this standard.

**Figure 1 – Road map for implementation of BS 8901**

The key is to produce a flexible framework which allows for all the dimensions of sustainability and actively encourages and recognizes learning and continual improvement.

A “maturity matrix” is provided in Table A.2 to map progression in terms of the application of these principles and to track progress through successive event cycles. (See also 4.7.)

## 1 Scope

This standard specifies requirements for a sustainable event management system and guidance on meeting those requirements. That is, the guidance provides additional practical information to support implementation.

This standard is applicable to all event organizations (including individuals), regardless of their role or responsibility in the event, or whether or not their core business is event management. This standard is applicable to clients (responsible for commissioning an event), organizers (the organization, or partner organizations, responsible for event organization), and other suppliers.

This management system specification is designed to operate at a project-specific level on an event-by-event basis. The specification is designed to be capable of addressing sustainability management of events through the entire event life cycle to include the key stages from conception and planning through to implementation and final review, or restricted to certain stages only, and/or specialist activities (e.g. certain suppliers).

*NOTE* Because the requirements for a sustainable event management system include stages of implementation, assessment and review, which are largely performed during and after the event, an organization can only claim to be “working towards compliance” before the event.

## 2 Normative references

The following referenced documents are indispensable for the application of this document. For dated references, only the edition cited applies. For undated references, the latest edition of the referenced document (including any amendments) applies.

BS 8900, *Guidance for managing sustainable development*

GREAT BRITAIN, *The event safety guide – A guide to health, safety and welfare at music and similar events*. HSG195. HSE Books 1999.

## 3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

### 3.1

#### **break-down**

post-event dismantling of event infrastructure

### 3.2

#### **build-up**

pre-event construction and preparation

### 3.3

#### **event client**

organization that commissions an event

### **3.4 event management life cycle event cycle**

stages and activities of an event, from conception through planning to implementation/event production (including build-up and break-down) and post-production evaluation and feedback

*NOTE Different from life cycle impacts (3.8)*

### **3.5 event organizer**

organization, or group of organizations, with overall responsibility for managing the delivery of an event (encompassing all activities that comprise the event)

### **3.6 internal audit**

systematic and documented process for obtaining audit evidence and evaluating it to determine the extent to which the management system audit criteria set by the organization are fulfilled

### **3.7 key performance indicator KPI**

specific measure of a critical success factor in a system against which quality/success (with regard to objectives) can be measured

### **3.8 life cycle impact**

impact occurring throughout the life cycle, i.e. from extraction of raw materials to end-of-life (“cradle-to-grave”)

### **3.9 management system**

system to establish policy and objectives and to achieve those objectives

### **3.10 organization**

commercial or voluntary, body or individual that takes responsibility for some or all of the management of an event and its sustainable development

### **3.11 stakeholder**

individual or group concerned with or affected by an event and/or its sustainability

### **3.12 supply chain**

linked set of resources and processes that upon placement of a purchase order begins the sourcing of raw material and extends through the manufacturing, processing, handling and delivery of goods and related services to the purchaser

[From DD ISO/PAS 28001.]

### 3.13

#### target

detailed performance requirement, applicable to the event that arises from the sustainability objectives and that needs to be set and met in order to achieve those objectives

## 4 Putting sustainable event management into practice

### 4.1 Organizational commitments to sustainable development and supply chain context

*NOTE* The delivery of an event represents the outcome of activities associated with the event management supply chain. The supply chain hierarchy implies that those organizations situated towards its apex (i.e. usually the client and/or event organizer(s)) possess most control over the entire supply chain and therefore the greatest opportunity to achieve a cohesive, consistent and holistic approach.

*These organizations are best placed to maximize the benefits of a sustainable approach to event management. Where the event client and/or event organizer(s) undertake to comply with this standard, the remaining suppliers will be governed by supply chain requirements to contribute to the management system. In these circumstances, the standard is useful in identifying the likely requirements that will be passed to suppliers through the supply chain arrangements (i.e. tender specifications and conditions of contract).*

*Where the event client and/or event organizer(s) do not wish to adopt and implement this standard it is unlikely that the rest of the supply chain acting together can bring about conformity to the requirements of this standard for the entire event. However, where this is the case, suppliers might still work towards compliance within their own, narrower scope of event activities, and extend the requirement to their own suppliers.*

#### 4.1.1 Purpose

Having decided to stage an event, an organization shall make a clear statement of purpose for the event, establishing terms within which there can be sustainable development. Preparation and maintenance of the statement shall be the sole responsibility of the organization, drawn up within the appropriate rules of governance and approved by the organization's governing body. The statement shall form the foundation for the organization's sustainable development activities and shall therefore help align primary purpose with related sustainable development activities.

*NOTE* Having considered the costs and benefits, it may be that the most sustainable course of action is to decide not to stage an event.

The organization shall, where possible, exert influence over other organizations (e.g. client and/or suppliers) higher up the supply chain (i.e. those with a broader scope of control with regard to the event activities and lifecycle) to make a commitment to comply with the requirements of this standard.

#### 4.1.2 Sustainable development policy

The organization shall draft a policy describing its commitment to the principles of sustainable development and its intention to promote the principles of sustainable development for the event (the policy for sustainable event management). Where appropriate, the policy shall draw upon the following elements of the client or organization's corporate/event strategy:

- a) leadership;

- b) mission and vision;
- c) event purpose;
- d) corporate values; and,
- e) strategic vision/intentions for sustainable development.

This policy shall represent the foundation for all further sustainable development management activities for the event. The statement shall also define the scope of the commitment in terms of its application to the event. This shall include all event-related activities over which the organization has control for the duration of its involvement in the event and associated with:

- 1) the organization and supply chain organizations (product and service providers); and,
- 2) the event life cycle, from concept through planning, implementation, and final evaluation and review.

## 4.2 Planning

*NOTE From a sustainability management perspective, the optimum (best) event solution is one based on a strategy that meets the objectives for the event while satisfying the sustainability objectives linked to key issues.*

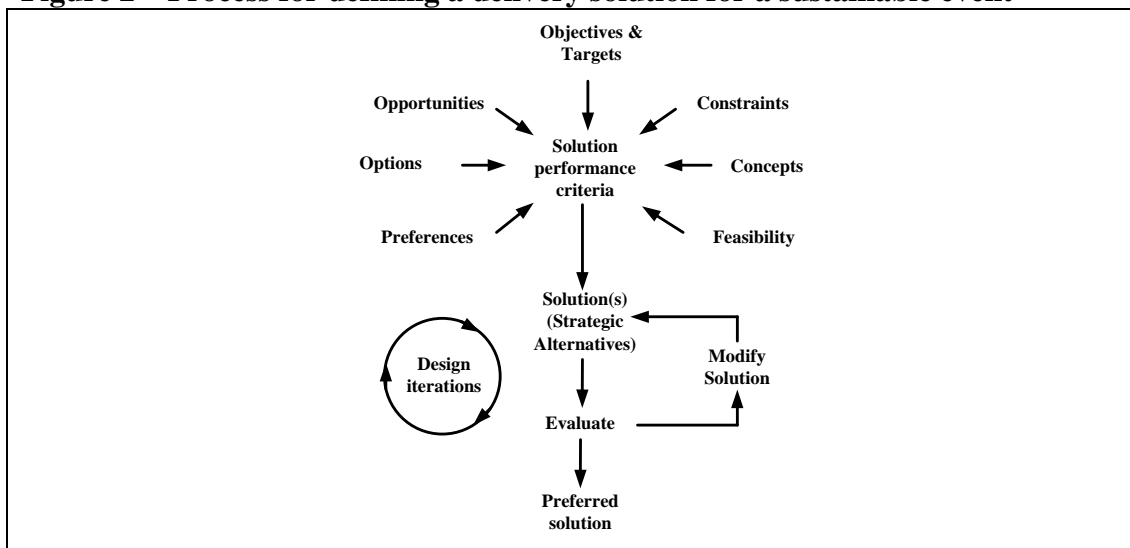
*Identifying an optimum solution depends upon proposing alternatives (“strategic alternatives”) covering key aspects such as venue, transport, accommodation, etc. The alternatives are likely to be defined by criteria that include meeting the objectives and targets, opportunities, options, preferences, constraints, conceptual ideas and feasibility, etc.*

*Once an event solution (or set of alternative solutions) has been proposed, it should be evaluated in terms of the sustainability framework by predicting the performance of the solution in terms of the objectives, KPIs and targets. Where the predicted performance does not meet expectations, other alternatives should be considered and evaluated. Where opportunities for better performance are identified, the alternatives should be refined.*

*It is important to recognize that the combination of technical options that together comprise the strategic alternative solution for an event might complement each other or might be in conflict. The combination of options (e.g. venue, caterer, transport plan, etc) chosen will define overall performance. In addition, it might not be possible to achieve all of the performance targets; consequently there will be trade-offs, and the preferred solution might be represented by the optimal trade-off of performance across a range of objectives/targets.*

*To illustrate these points, several venues may be proposed. Through consideration of venue options, Venue A might be considered more suitable than others on the basis of facilities (e.g. disability access). However, another venue, considered less suitable in this regard, might have better transport links, offering opportunities to reduce transport-related impacts.*

*The preferred solution should be derived through an iterative process of propose a solution, evaluate, refine (by considering other options), and re-evaluate. Figure 2 is a schematic representation of this process.*

**Figure 2 – Process for defining a delivery solution for a sustainable event**

#### 4.2.1 General

The management of sustainability shall be by identification of issues, using them to establish sustainability objectives, implementing operating procedures to meet those objectives, and monitoring the outcomes. The main mechanism to identify issues shall be through stakeholder engagement. The broader purpose of stakeholder engagement shall be to:

- a) afford stakeholders the opportunity to express their views concerning event issues and their relationship with the event;
- b) demonstrate that issues and concerns have been considered and addressed in a transparent manner to ensure accountability; and,
- c) create dialogue from which organizations can learn and develop in relation to managing sustainability issues effectively.

In managing the sustainability issues of an event, successful stakeholder engagement shall be defined in terms of:

- 1) responsibility for stakeholder engagement being taken by the organization with the broadest scope of control over the event activities and lifecycle;
- 2) identifying all of the stakeholders with whom dialogue is deemed essential;
- 3) engaging with stakeholders using appropriate means and at the right level;
- 4) analysing and interpreting the information to inform the decision-making process;
- 5) taking the necessary action(s); and,
- 6) ongoing, systematic stakeholder engagement as an integral part of the management process.

#### 4.2.2 Stakeholders

*NOTE* Guidelines for stakeholder identification and engagement are given in BS 8900.

##### 4.2.2.1 Stakeholder identification

The identification of stakeholders shall, *where applicable*, encompass:

- a) event client(s);
- b) supply chain elements (event organizer(s), suppliers, contractors, etc.);
- c) event customers, spectators and/or participants;
- d) partners and sponsors;
- e) sector interest organizations (e.g. trade/industry bodies);
- f) the local community (including neighbours and transport hubs where applicable);
- g) statutory bodies;
- h) emergency services;
- i) security services; and,
- j) relevant non-governmental organizations (e.g. environmental groups).

The organization shall identify those stakeholders that have a statutory right to be consulted.

#### **4.2.2.2 Managing stakeholder issues**

The organization shall implement a process for managing stakeholder issues. The organization may contract the services of a secondary organization to manage the process implementation.

The organization shall ensure that its suppliers are held responsible for the accurate flow of information between their own suppliers and the organization responsible for managing the programme of stakeholder engagement.

#### **4.2.2.3 Stakeholder engagement**

Stakeholder engagement shall be undertaken for the purpose of understanding the economic, social and environmental impacts of the event activities. This includes activities associated with the full lifecycle stages of events, as well as indirect impacts, for example, those associated with the supply chain.

### **4.3 Issue identification and target setting**

#### **4.3.1 Assessing risks and opportunity**

*NOTE Identification of event issues is central to the assessment of risk and opportunity. Event issues present opportunities for innovation and creativity as well as potential risks.*

##### **4.3.1.1 Identify sustainability issues and establish significance**

The organization shall take primary responsibility for co-ordinating the process of identifying sustainability issues and establishing their significance, in consultation and collaboration with the stakeholders.

The organization shall ensure that suppliers over which they have influence identify issues in relation to the event activities for which they are responsible, assess these issues to establish their significance and communicate their findings to the co-ordinating organization.

The organization shall identify the issues defined as having the potential to represent significant potential risk or opportunity to the event as key sustainability issues (further information on identifying key issues and determining significance is provided in Table 1 and **A.2.4.1**).

### 4.3.1.2 Develop objectives

Sustainability objectives form a structured framework for considering the likely effects of the event plan and plan alternatives; the organization shall develop the sustainability objectives through engagement with the stakeholders.

The organization shall define objectives for the event based upon:

- a) the sustainability aspirations and policies (4.1.2); and,
- b) the key sustainability issues (4.3.1.1).

The sustainability objectives shall be tested against each other as well as other objectives defined for the event (e.g. commercial objectives) to identify synergies or inconsistencies. The outcome of this assessment shall be used to refine the objectives and/or inform the approach to meeting the objectives.

**Table 1 – Themes and categories of potential sustainability issues encountered during event management**

Categories	Questions to determine whether an issue exists	Outcomes (indicative)
<b>Environmental</b>		
Climate change	Will the activity generate energy demands?	Reduce energy use/demand and promote the use of renewable supplies of energy. Offset carbon emissions associated with energy use. Avoid use of new-build venues.
	Will the activity generate an increased need for travel?	Reduce the need for transport and promote efficient modes of travel and renewable fuels. Offset carbon emissions associated with transport use.
Air quality	Will the technologies employed for the activity's energy supply and transport generate air emissions?	Reduce emissions to air by promoting low emission technologies for energy supply and transport.
Water use	Will the activity require water?	Minimize water use and promote water efficiency.
Land use	Will the activity require previously developed land (rather than greenfield sites) to be used?	Optimize the use of previously developed land when selecting the location of an event.
	Will the activity affect its surroundings?	Design the event building/structure with consideration to its surroundings / mitigate effects in surrounding areas.
Biodiversity	Will the activity affect existing biodiversity resources?	Protect existing biodiversity resources and implement opportunities to enhance habitats and species.
Archaeology and cultural heritage	Will the activity affect sites of archaeological or cultural interest?	Protect sites of archaeological or cultural interest.
Emissions to water	Will the activity affect the water quality?	Maintain water quality and prevent pollution.
	Will the activity affect the watercourses?	Protect watercourses and prevent pollution.
Emissions to land	Will the activity give rise to risks of ground contamination at the site?	Minimize risks of ground contamination at the site.
Solid waste management	Will the activity generate waste materials?	Minimize the amount of waste materials produced and encourage reuse, recycling and recovery of waste.

**Table 1 – Themes and categories of potential sustainability issues encountered during event management (cont'd)**

<b>Environmental, social and economic</b>		
Procurement – Product stewardship	Will recyclable or re-useable waste be generated from the activity's purchased products?	Promote “closed loop” waste management by purchasing reusable products or products with a recycled content.
	Will the activity give rise to ethical or environmental issues from the procurement of products?	Promote ethical and environmental issues in the procurement of products.
	Will the activity give rise to ethical or environmental issues from the supply chain?	Promote ethical and environmental issues in the supply chain.
	Are the contractual terms fair?	Ensure fair contract terms with suppliers
	Will those employed during the activity have fair terms of employment?	Promote fair terms of employment for those employed during the event.
	Will products/services required for the activity be sourced locally?	Promote the use of locally sourced products and services to reduce transport impacts and support the local economy.
<b>Social and Economic</b>		
Health, safety and comfort	Could the activity impact negatively on the health, safety and comfort of event stakeholders?	Ensure the health, safety and comfort of the stakeholders at or likely to be affected by the event.
Security	Could the activity give rise to security issues?	Maximize security and the sense of well-being of visitors, exhibitors and speakers.
Equal opportunity and diversity	Will the activity ensure equality for all?	Ensure equality is ensured for all in relation to the event.
Community, local employment and skills	Will the activity give rise to investment in local skills and employment?	Encourage investment in local skills and employment.
	Will the activity cause nuisance to the local community?	Avoid nuisance to the local community.
Amenity	Will the activity provide suitable amenities to enhance the area/site and visitor experience?	Provide suitable amenities to enhance the area/site and visitors experience.
Viability	Will the activity be viable financially?	Ensure the financial viability of the event, including security of funding.

**Table 1 – Themes and categories of potential sustainability issues encountered during event management (cont'd)**

<b>Managing delivery</b>		
Governance	Will there be an appropriate governance framework for the activity in terms of sustainable event delivery?	Implement an appropriate governance framework to manage sustainable delivery of the event.
Risk	Are sustainability risks associated with the activity adequately managed and minimized?	Identify key sustainability issues in order to minimize and manage sustainability risks.
Communication, stakeholder engagement and awareness raising	Will there be regular communication with stakeholders throughout the activity to encourage improved sustainability performance?	Communicate with stakeholders regularly to encourage improved sustainability performance.
Supply chain management	Will the costs and benefits of the event be shared fairly throughout the supply chain?	Ensure that the costs and benefits of sustainable events are shared fairly throughout the supply chain
	Will supply chain management procedures be put in place for the activity to achieve a desired level of sustainability performance?	Implement supply chain management procedures that successfully deliver the sustainability objectives of the event.
Monitoring, reporting and verification of event supply chain performance	Will the sustainability performance of the activity be adequately monitored and measured?	Monitor and measure the sustainability performance of the event.
	Will the sustainability performance of the activity be reported on externally?	Provide an external report on the sustainability performance of the event.
	Will the activity be verified externally?	Obtain external verification of the event report(s).

#### **4.3.1.3 Assessing strategic alternatives and defining strategy**

*NOTE* The “preferred solution” is the approach that is adopted to deliver the event. There is often more than one approach that can be implemented to provide the solution, and these are referred to as the strategic alternatives.

The organization shall develop of strategic alternatives for event delivery aimed at optimizing performance against sustainability objectives. The preferred strategy is likely to be arrived at through an iterative process of define, evaluate, review, refine. That is, having chosen an initial strategy, its effects shall be predicted and the strategy re-assessed until it is produce the objectives defined.

The organization shall co-ordinate the process in an integrated way that reflects the role and contribution of other organizations. The organization shall, where appropriate, ensure that suppliers contribute to the process.

#### **4.3.2 Setting key performance indicators and targets**

Key performance indicators (KPIs) provide an essential means of measuring the performance of the event in achieving the sustainability objectives; the organization shall identify and define KPIs and targets relevant to the sustainability objectives and set challenging but realistic targets for itself and its suppliers.

For each objective, a target(s) shall be set based on the following broad scale (and in more detail against the maturity matrix [Table A.3]), with the aim of achieving the highest performance level and the greatest improvement practicably possible:

- a) legal compliance;
- b) best current practice; and,
- c) beyond best current practice.

By acknowledging a range of targets, the organization shall adapt its preferred strategy by setting higher performance targets for those objectives that it has the greatest capacity to address. At the same time, the organization shall build expertise and capacity to achieve continuous performance improvement by setting higher targets through successive event cycles.

*EXAMPLE Examples of KPIs are as follows:*

<b>Objectives</b>	<b>KPIs</b>
<i>Reduce energy use/demand and promote the use of renewable supplies of energy. Offset carbon emissions associated with energy use.</i>	<i>Energy consumption (kWh), carbon dioxide emissions (tonnes), Renewable energy supply (%), etc.</i>
<i>Ensure the health, safety and comfort of the stakeholders at the event.</i>	<i>Noise levels (db), Serious accidents per working hours (no.), etc.</i>

*Targets represent the minimum acceptable performance level and this should be stated for each of the key performance indicators. In order to achieve continuous performance improvement, organizations should set targets that are challenging but achievable, and that are increased through successive event cycles.*

*It should be noted that there is no requirement to meet the same performance level for each objective. This allows organizations to set more challenging targets in areas where they feel they have the greatest capability to meet them (and conversely to set less demanding targets where there is least capability) and to identify those areas where capability needs to be built. Organizations would be expected to achieve a higher and more consistent level of performance over time.*

*This standard recommends establishing three different performance levels corresponding to basic legal compliance, best current practice, and beyond best practice.*

*At the time of publication, best current practice defines a 50% reduction in greenhouse gas emissions (GHGs). However, for specific reasons, for example if the theme of the event is “Convention on Climate Change,” the event client might wish to go beyond best current practice to achieve zero carbon emissions. It should be recognized that the actual performance required to achieve any of the three performance levels will change with time (as legislation, best practice, etc. change and evolve), consequently this standard does not attempt to define these.*

*However, organizations are likely to respond to similar issues from event to event. Also, research undertaken to build the knowledge base to determine the performance targets for one event should be transferable to subsequent events. Organizations should discuss their needs for best practice guidelines and/or an industry-specific information database with trade representatives, trade bodies, etc.*

## 4.4 Implementation

### 4.4.1 General

*NOTE 1* Since events are characterized by supply chain relationships, the successful implementation of sustainable event management will depend upon the sustainable event management system operating across supply chain boundaries.

*Guidance on approaches to sustainable procurement (particularly whether the relationship with suppliers should be one of “command and control” or “partnership” is given in B.6.*

The organization shall establish, implement, maintain and continuously improve a sustainable event management system appropriate to the nature, scale, frequency, timing and duration of the event, encompassing all event-related activities.

The organization shall ensure that suppliers undertake those activities deemed necessary to meet the requirements of this standard. Suppliers shall be provided with appropriate guidance to allow integration of the management system down the supply chain.

Events are project-oriented activities, characterized by their temporary nature and generally defined by a sequence of stages; organizations shall ensure that the activities required by the management system are undertaken at appropriate points of intervention along the timeline of the event stages. (Guidance on the integration of the sustainability management system activities with the stages of event management is provided in Table 2 and A.2.5.)

*NOTE 2* Where appropriate, sustainable event management systems developed for one event may be modified, adapted and improved for application in other events to avoid duplication of effort at the start of each event cycle.

**Table 2 – Template of event stages with key sustainability activities.**

<p><b>Stage 1, event feasibility:</b></p> <ul style="list-style-type: none"> <li>a) identify market;</li> <li><b>b) identify stakeholders/partners;</b></li> <li><b>c) initiate stakeholder engagement;</b></li> <li>d) develop concept;</li> <li>e) identify criteria for success;</li> <li><b>f) define organizational commitment to sustainable development/sustainable event management;</b></li> <li>g) draw up business/financial plan;</li> <li>h) identify/research dates/timeline (i.e. potential conflicts);</li> <li>i) identify/research key issues<sup>A)</sup>, for example: <ul style="list-style-type: none"> <li>1) transport plan – on-site and as means of attendance;</li> <li>2) risk assessments;</li> <li>3) health and safety/medical arrangements;</li> <li>4) security plan/police;</li> <li>5) event schedule;</li> <li>6) build up/break down plan;</li> <li>7) disability access;</li> <li>8) waste;</li> </ul> </li> <li>j) identify/research location;</li> <li>k) identify/research venue;</li> <li>l) identify/research key players (performers, competitors, speakers);</li> <li>m) obtain permissions (licensing, etc.);</li> <li>n) internal de-brief;</li> <li><b>o) identify roles, responsibilities and resources for sustainability management.</b></li> </ul> <p><sup>A)</sup> Examples only – this is not an exhaustive list.</p>	<p><b>Stage 2, event planning:</b></p> <ul style="list-style-type: none"> <li><b>a) set and define objectives, KPIs and targets;</b></li> <li><b>b) identify strategic alternatives;</b></li> <li><b>c) develop sustainable procurement strategy;</b></li> <li>d) develop business/financial plans;</li> <li>e) enter into agreement with key partners/stakeholders;</li> <li>f) define organizational structure/assign roles and responsibilities;</li> <li>g) develop project/operations plans;</li> <li>h) develop rules/conditions/regulations;</li> <li>i) develop communications/design strategy/plans;</li> <li>j) develop marketing/promotion/media plans;</li> <li>k) identify prospective suppliers;</li> <li>l) enter into agreement with venue;</li> <li>m) enter into contract with contactors;</li> <li>n) develop layout plans;</li> <li>o) develop waste management plans;</li> <li>p) develop staffing plans;</li> <li>q) develop emergency/contingency plans;</li> <li>r) select speakers or equivalent;</li> <li>s) attract sponsors;</li> <li>t) communicate the event conditions, rules and regulations;</li> <li><b>u) define monitoring and measurement framework and protocols;</b></li> <li><b>v) continue stakeholder engagement.</b></li> </ul>
<p><b>Stage 3, sales and marketing:</b></p> <ul style="list-style-type: none"> <li>a) implement marketing/sales strategy;</li> <li>b) develop PR/media plan;</li> <li>c) generate mailing list/identify sources/modes of advertising;</li> <li>d) ticketing;</li> <li>e) printing: <ul style="list-style-type: none"> <li>1) newsletter;</li> <li>2) advertising;</li> <li>3) email;</li> <li>4) direct mail;</li> <li>5) posters;</li> <li>6) brochures;</li> </ul> </li> <li>f) sales activities;</li> <li>g) sales trips;</li> <li>h) face-to-face marketing;</li> <li>i) internet;</li> <li>j) generate attendance information and booking systems;</li> <li><b>k) continue stakeholder engagement</b></li> </ul>	<p><b>Stage 4, event pre-production:</b></p> <ul style="list-style-type: none"> <li><b>a) develop tender-specific sustainability performance specifications and additional guidance as required;</b></li> <li><b>b) assess tenders on the basis of best value including sustainability criteria;</b></li> <li><b>c) include sustainability performance criteria into conditions of contract;</b></li> <li>d) procure suppliers, which can be split into 4 broad categories: <ul style="list-style-type: none"> <li>1) infrastructure;</li> <li>2) consumables;</li> <li>3) services;</li> <li>4) people;</li> </ul> </li> <li>e) select/invite speakers, performers, players, competitors, etc.;</li> <li>f) undertake risk management, for example: <ul style="list-style-type: none"> <li>1) environment;</li> <li>2) disability;</li> <li>3) security procedures/liaise with police</li> </ul> </li> <li><b>g) continue stakeholder engagement..</b></li> </ul>

<p><b>Stage 5, event production:</b></p> <p><b>a) monitoring and measurement;</b>  <b>b) evaluation of compliance;</b>  c) manage risk, for example:  1) health and safety;  2) environment;  3) disability;  4) security;  d) manage training;  e) land management;  f) manage transport;  g) manage waste;  h) manage media;  i) registration/ticketing;  j) manage build up and break down;  k) manage event;  l) manage customers and visitors, eg:  1) registration;  2) feedback;  3) flow;  m) monitoring staging/seating;  n) “making good” (penalties/retributions);  <b>o) continue stakeholder engagement;</b>  <b>p) internal audit.</b></p>	<p><b>Stage 6, evaluation:</b></p> <p><b>a) sustainability review;</b>  <b>b) conclude stakeholder engagement;</b>  c) performance assessment against success criteria;  d) knowledge sharing, lessons learnt (loop back to Stage 1 and/or feed forward to similar events);  e) visitor/participant questionnaire/focus group;  f) venue/contractor de-brief;  g) internal/external audit;  h) analysis.</p>
<p><i>NOTE 1 Items in bold are a requirement of this standard. Other items are good practice.</i>  <i>NOTE 2 See A.2.3 for a detailed explanation of use how to use this table.</i></p>	

#### 4.4.2 Capability

The organization shall provide the necessary resources and competencies to establish, implement, maintain and improve a sustainable event management system that conforms to this standard.

#### 4.4.3 Roles and responsibilities

Board-level management or equivalent (“senior management”) shall take overall responsibility for facilitating sustainable event outcomes within an organization’s scope of activities by appointing a management representative to act as a “sustainability champion” with primary responsibility to establish, implement, maintain and improve a sustainable event management system according to the requirements of this standard. Senior management shall make the necessary resources available.

*NOTE In small companies, the sustainability champion will typically be the owner/director and for individuals, that individual is the sustainability champion.*

#### 4.4.4 Resources

The organization shall allocate appropriate resources to achieve sustainable event management objectives and extend the requirement to suppliers. Resources shall encompass staffing, expertise, training, infrastructure, technology and finance. Resource requirements shall be assessed in terms of:

- a) nature and scale of activities (determined through identification of issues/risk and opportunity assessment);
- b) occurrence (i.e. how often, at what stages of the event life cycle and for how long the resources are required);

- c) cost/benefit (do the benefits of the resources justify the expense); and,
- d) financial planning (ensuring that the organization makes adequate provision in the financial planning process for expenditure in relation to resource requirements).

#### **4.4.5 Competence and training**

The organization shall ensure that persons working on its behalf in any capacity related to the delivery of the event (i.e. event employees, including supplier employees) are able to demonstrate the necessary competencies for their particular job profile (as defined in a job description or contract, where these exist) on the basis of education, qualification, training or experience.

The organization shall ensure that employees are made aware of:

- a) policy, procedures and requirements in relation to sustainable event management, and specifically the requirements for compliance with this standard;
- b) significant sustainability issues that the employee has control or influence over by virtue of the precise nature of their role, as well as procedures and performance targets to manage these issues;
- c) legal compliance issues; and,
- d) consequences of non-compliance with policy, procedures and requirements.

The organization shall take responsibility for identifying the training needs and knowledge required by event employees to undertake their roles. Training and development programmes shall be reviewed periodically and updated to reflect changing needs. The organization shall ensure that training programmes are implemented to develop essential competencies.

#### **4.4.6 Operational control**

The organization shall ensure that the activities and operations (of all individuals and organizations including suppliers) that could influence sustainability objectives are planned and managed effectively. The organization shall:

- a) establish, implement and maintain operating procedures for key activities and operations;
- b) where appropriate, communicate operating procedures to supply chain partners; and,
- c) where necessary, ensure that supply chain partners establish, implement and maintain operating procedures for their specialist activities and operations.

In addition, the organization shall make specific provision for emergency response following the recommendations of the Health and Safety Executive's event safety guide.

#### **4.4.7 Supply chain management**

*NOTE The delivery of an event often depends upon engagement with extensive supply chains offering a wide range of products and services. These suppliers are likely to vary from specialist suppliers to those who are non-specialist and whose core business may or may not be linked to the events industry.*

*In order to achieve the objectives for a sustainable event, it is essential to extend the principles of the sustainable event management system throughout the supply chain wherever possible. Procurement provides the mechanism to integrate sustainable event management into the supply chain (see Annex B).*

The organization shall establish the relevance of each of the issues, objectives, KPIs and targets (developed as part of the sustainability framework – see **4.3.1.1** and **4.3.1.2**) to individual suppliers.

The organization shall include sufficient information in tender specifications and contracts to enable its suppliers to demonstrate their capability to meet or exceed the objectives for sustainable event management.

Information provided by the organization shall be written, preferably in the form of a performance specification, to include:

- a) the requirement to contribute to the event in compliance with BS 8901;
- b) issues, objectives, KPIs and targets relevant to the contract;
- c) project timeline and delivery milestones;
- d) a description of, and the requirement to undertake, those activities deemed necessary to ensure that the requirements of this standard can be met;
- e) requirements of organizations subcontracted by suppliers; and,
- f) scope and level of detail required in the tender submission, e.g. suppliers strategy for meeting objectives, description of the activities that will be undertaken to support the contracting organization to meet the requirements of this standard.

Where relevant, the organization shall assess tender submissions on the basis of best value, where the best value supplier is selected on the basis of their capability to meet sustainability targets, cost-effectiveness and quality. The organization shall incorporate the sustainability performance criteria provided in the preferred supplier's tender submission into the supplier's conditions of contract. Sufficient detail shall be included to be able to determine instances of non-compliance and to inform subsequent performance reviews.

#### **4.4.8 Communication and coordination**

*NOTE Effective communication plays an important role in promoting sustainability management in a way that is consistent, both in terms of the full scope of event activities (including the supply chain) and also in achieving performance outcomes.*

The organization shall implement a communications strategy to promote sustainability management among stakeholders (the supply chain and other stakeholders) and enhance synergies (and avoid conflicts) through collaboration and co-ordination.

The organization shall engage with its stakeholders to identify effective means of communication and the direction and content of these communications. This engagement shall take into account the interests of different stakeholder groups, whether the organization has control or influence over the stakeholder group and integration with other event communication strategies.

The organization shall include, where (and when) appropriate, the following information in its communications:

- a) aspirations for the event;
- b) system for managing sustainability;
- c) issues, objectives, KPIs and targets;
- d) guidance, best practice in achieving objectives, targets, etc.;

- e) relevance to organizations (roles and responsibilities);
- f) key contacts;
- g) progress in relation to performance (monitoring stage);
- h) performance achieved (review stage); and,
- i) lessons learned (review stage).

#### **4.4.9 Documentation and record-keeping**

*NOTE 1 Documentation of the management system, as well as issues arising from its implementation for an event, are essential in demonstrating transparency and accountability, as well as enabling the possibility of third party verification.*

*NOTE 2 Organizations that collect data about stakeholders are subject to the Data Protection Act 1998 [1].*

The organization shall establish, implement, maintain and continually improve a document management system. The organization shall ensure, where appropriate, that its suppliers contribute to the document management system. On an event-by-event basis, the document management system shall include as a minimum:

- a) the statements of purpose and policy required by **4.1**;
- b) a stakeholder register and records of stakeholder engagement (see **4.2**);
- c) a description of the key issues addressed by the sustainable event management system, and the objectives, KPIs and targets pertaining to the key sustainability issues (see **4.3**);
- d) data captured during monitoring and measurement activities, including emergency incidents and incidents of operational non-compliance; and
- e) review reports (see **4.5**).

Where applicable and not immediately obvious, the document management system shall also include:

- 1) a list of applicable legislation and policy;
- 2) organizational roles and responsibilities pertaining to the activities of the organization and suppliers over whom the organization has control;
- 3) emergency response procedures;
- 4) supply chain: procurement strategy, tender specifications and conditions of contract;
- 5) records of communications;
- 6) internal/external audit reports;
- 7) procedures for control of documents and records, including roles and responsibilities for document management and approval.

### **4.5 Assessing performance**

#### **4.5.1 Monitoring and measurement**

*NOTE Monitoring and measurement activities provide the essential evidence base for performance levels attained and/or instances of non-compliance.*

The organization shall establish, implement, maintain and continually improve appropriate procedures for measuring performance in relation to the KPIs identified in **4.3.2**.

#### **4.5.2 Evaluating compliance and responding to non-conformity**

*NOTE* Ongoing evaluation of monitoring and data measurement informs the decision-making process determining whether operating characteristics for activities are acceptable, and will result in compliance with legal and other requirements (e.g. performance targets, documentation), or whether non-conformities are identified that require corrective action to be taken.

The organization shall establish, implement, maintain and continually improve procedures for evaluating compliance with legal and other requirements for all event activities. The organization shall keep records of the outcomes of the evaluation of compliance.

The organization shall also establish, implement, maintain and continually improve procedures for managing non-conformities identified by the compliance evaluation system for activities within their direct control and those over which they have control (the supply chain). These procedures shall define requirements for:

- a) anticipating non-conformities and recommending preventative action;
- b) correcting actual incidents of non-conformity;
- c) investigating the causes of actual non-conformities and making recommendations to prevent recurrence; and,
- d) recording interventions in the form of preventative or corrective actions and recommending procedural changes to reduce future risk of non-conformity.

The organization shall ensure, where appropriate, that suppliers contribute to compliance evaluation and to non-conformity response.

#### **4.5.3 Sustainable event management system audit**

*NOTE* Gathering feedback from stakeholders and acting on it is important for building confidence as described in BS 8900.

Sustainability management is based on the principle of continuous performance improvement; the organization shall maintain procedures for periodic sustainable event management system audits, to ensure that:

- a) the implementation and maintenance requirements of the management system are being met; and,
- b) the implementation of the management system is achieving the desired outcomes in terms of the sustainability performance of the event.

The organization shall establish, implement and maintain procedures for auditing that include:

- 1) the frequency, scope, methodology and criteria for internal auditing;
- 2) roles and responsibilities for internal audit; and,
- 3) communicating outcomes and recommendations from audits to senior management.

The organization shall ensure that the requirements for auditing are extended to its suppliers whose activities have a bearing on the sustainability performance of the event.

#### 4.6 Review

*NOTE* The review process assists an organization to assess the fitness-for-purpose of its sustainability management system as a mechanism to achieve its sustainability objectives, including the ability of the organization to implement it. Management review is a key activity facilitating continuous improvement and one of the core principles of sustainability management.

The organization shall conduct management reviews at regular intervals appropriate to the scale and frequency of its involvement in events. The organization shall synchronize management reviews with the event life cycle, or where there is continuous involvement in multiple events, conduct management reviews at intervals that maximize learning opportunities from different events. Management reviews shall assess performance against the following issues:

- a) satisfying the needs of stakeholders as identified by stakeholder engagement;
- b) meeting the organization's conditions of contract (both as a supplier to another organization and as a customer);
- c) the organization's suppliers meeting the conditions of contract defined for them;
- d) achieving objectives and targets (performance);
- e) effectiveness of strategy for achieving objectives and targets;
- f) compliance with legal and other requirements, and attention to non-conformities (corrective/preventative actions); and
- g) implementation of previous review recommendations and outcomes.

From management reviews, the following shall be extrapolated:

- a) lessons learned; and,
- b) maturity of sustainable event management system (position in relation to and movement across the maturity matrix; see also **A.2.7**).

#### 4.7 Follow up

The organization shall feed the lessons learned from each event to its own events and make the information available to organizers of similar events on request (particularly "one off" events).

To remain BS 8901 compliant, the organizer shall ensure that its events progress across the maturity matrix (see Table A.2); progress across the maturity matrix is the practical result of following the requirements of this standard as set out in the road map in Figure 1.

## **Annex A (informative)**

### **Guidance for use of this specification**

#### **A.1 Compliance**

Where responsibility for complying with the standard is taken at a point higher in the supply chain (i.e. the client and/or supplier with direct/indirect contractual authority), an organization can only contribute to a sustainable event management system, and the supply chain arrangements (the tender specifications and/or conditions of contract) should take precedence over the requirements of this standard. However, in these circumstances, the standard provides useful information on the requirements that the responsible organization is likely to impose through the supply chain, and the reasons behind them.

In the absence of the client and/or other suppliers higher in the supply chain taking responsibility for complying with the standard, an organization can take responsibility for the event activities represented by their own sphere of control, and extend requirements to its own suppliers to contribute to the sustainable event management system.

Finally, this standard should be capable of being applied to the full diversity of events ranging from, for example, major sporting occasions to village fetes, etc., recognizing that the issues and activities associated with events of varying nature and scale might differ substantially. From a practical point of view, the effort required to manage events sustainably should be proportional to the nature and significance of the issues identified.

This guidance section focuses on selected key information and is designed to assist organizations implement the requirements (the specifications) of the standard. This information takes the form of further explanatory notes and a series of checklists.

#### **A.2 Assessing risks and opportunity – Identifying issues and establishing significance**

Issues arise in relation to activities. The organization should compile a checklist of event management activities that can be amended and added to through successive event cycles. Table A.1 provides an example of an event activities checklist.

It is important to note that the purpose of the checklist is *not* to define the nature of events, but to provide a mechanism to assist in the identification of activities for which sustainability management might be required. The precise activities listed in this example are not intended to be either representative or exhaustive and will vary considerably depending on the role of an organization in event management, and the precise nature of specific events.

**Table A.1 – Checklist of activities in event management**

Activity	Is this activity relevant to the event (Yes/No)?
Risk management Major incident/emergency planning Fire safety, including fireworks and pyrotechnics Health and safety Medical, ambulance and first-aid management Waste management, disposal and litter picking Food, drink, water and hygiene controls Sanitary facilities Licensing and local consultation Planning and management Crowd management, including children Information and welfare, including visitor information and VIP services Involvement/participation for people with special needs Staffing Communications, including internal and external signage and banners Merchandising and special licensing Venue, including site selection, preparation, design, construction and management Transport management, including site traffic Access, including perimeter and external infrastructure, temporary roadways barriers, fencing, and facilities for special needs Security Electrical services: installation and lighting Sound: systems, noise and vibration Special attractions, amusements and effects, including promotional displays Structures: temporary and permanent Performers, including children, animals TV and media, AV, technology services Accommodation, including camping	

Table 1 (4.3.1.1) is designed to assist users identify sustainability issues that could arise as a result of the event activities identified. Column one identifies a series of potential sustainability issues (climate change, air quality, etc), categorized into the sustainability dimensions of environmental, social and economic and including an additional category, “managing delivery”, aimed at governance and implementation. Column two provides a set of questions that the user can ask to determine whether the

activities give rise to specific sustainability issues. The user should apply the set of questions to *each* of the event activities identified.

Note: the key (or significant) issues can be identified by applying the following criteria to the sustainability issues identified:

- a) *The magnitude of effects*: i.e. the size of the effects. For example, an event which is required to provide catering facilities for 10 000 people is more likely to have a significant effect than an event catering for 50 people.
- b) *The time period over which the effects occur*: a week-long festival is more likely to have significant effects than a comparable event taking place over a weekend.
- c) *Whether the effects are permanent or temporary*: for example, construction for a major event may result in loss of green space or habitat through permanently altered land use, whereas damage or disruption to habitat from erecting temporary structures may not. This could also take into account any intended (i.e. positive) legacy effects of the event.
- d) *Whether the effects are positive or negative*: although identification of issues generally tends to identify negative consequences of activities, it is also important to appreciate that activities can also generate positive effects. For example, fixtures and fittings that would otherwise contribute to the waste stream could be donated to local charities/community groups.
- e) *The probability of the effects occurring*: if the probability of an effect occurring is high, then there is a greater likelihood of resources being required to mitigate potential effects, and as a consequence, the significance is higher. For example, one would expect the probability of a serious accident/incident occurring at an airshow or motor-racing event to be higher than at an awards ceremony. The level of significance would suggest the need for a higher level of emergency response.
- f) *The frequency of event occurrence*: if an effect occurs more frequently, it will be more significant than if it only occurs occasionally. For example, some events are weekly (e.g. football fixtures during the winter months) whereas others might occur only once during the year (e.g. motor show).
- g) *Whether there are cumulative effects*: an effect may be more significant if it is considered alongside other activities/event/projects, etc which have similar effects. For example, the effect of spectators exiting from an event en mass during peak travel times is likely to be more significant, than outside of peak hours.
- h) *Whether there are secondary effects*: secondary effects should also be considered when determining an issue's significance. For example, an event that generates additional traffic loads may in turn lead to significant traffic congestion, lowering of air quality due to vehicle emissions, and higher accident rates.
- i) *Whether there are synergistic effects*: an example of a synergistic effect is where the effects of crowding (e.g. of spectators) are more significant where the weather is extremely hot, due to discomfort (behaviour and security) and/or health impacts (heat stroke, etc).

### **A.3 Review and follow up**

Organizations should routinely track and review their progress in relation to continuously improving their sustainable event management capabilities and outcomes. BS 8900 proposed an outline development maturity matrix framework to assist organizations to achieve this. This tool should be implemented by event industry organizations in order to establish their level of development in terms of sustainable development along a scale ranging from “minimum involvement” to “full engagement”.

The practices associated with the main principles of sustainability management such as inclusivity, integrity, stewardship and transparency are represented by characteristics/criteria appropriate to an organization at different stages of its maturity with regard to sustainable development. For example, an organization may consider itself to have met its sustainability objectives fully (represented by full engagement) in key management issues such as supply chain by fully recognizing the community of interest and providing assistance to lower tiers where necessary.

Organizations should determine their current position by evaluating performance against the criteria in the table. Particular attention should be given to areas in which the organization is weak to inform the process of progression towards maturity.

The matrix should be kept up to date to reflect changing circumstances. The position of the organization depicted by the matrix may be used in the review process and/or used to demonstrate their sustainability progress to stakeholders.

Table A.2 shows an outline structure for a sustainable development maturity matrix. This list is not exhaustive and the elements and stages might differ between organizations, therefore this table is for guidance and illustration only.

**Table A.2 – Outline structure for a sustainable development maturity matrix**

Principals and practice		Characteristics of developing organizations				Full	
		Minimum	Maturity			Engagement	
Inclusivity	Stakeholder engagement and issues identification	Restricted to few	Defensive Some dialogue with immediate stakeholders, especially shareholders	Systematic stakeholder identification. Issues emerge and clarified PR and competitive advantages recognized and opportunistically utilized	Strong and continuing engagement of all relevant stakeholders. Issues clear and regularly reviewed. Strengthening relationships	Feedback networks established. Promotion and support of wider sustainable development	Issues clear. Focus on
Integrity	Key drivers	Quarterly returns-driven Profit paramount	Reactive-driven by regulatory, NGO, shareholder and/or investor pressures Cost/return decisions	Sustainable development part of reputation/risk management Based on longer term development	Short, long term and broader view fully integrated seeking out opportunities	Proactive planning and Championing of sustainable development	
	Leadership, vision and governance	Directive and narrowly focused	Adherence to (one or more) public codes	Leadership commitment consistent Publish SD and SR statement, policy and objectives Non executives influential	Sustained leadership internally and externally values integrated	Purpose, vision and Key role of reviews based on audit and analysis of performance	
	Managing risk	Fire-fighting	Compliance by the book Compliance effort where likelihood of enforcement Seek “safe harbours”	Main risks identified and managed Performance indicators, but sustainable development separate	Sustainable development policies fully integrated Prevention rather than cure	Spirit not letter	
Stewardship	Sustainable development culture	Minimalist: doing as little as can “get away with”	Tick-box approach, seeing PR only, if little cost/impact Meeting regulatory baseline requirements only	Seeing link between sustainable development and business advantage but PR/marketing focus Developing education programme	Culture of sustainable development embedded at all levels and ethical approach	Values-led Sustainable development part of all relevant planning and decision making Wide understanding and buy-in Sharing know-how outside organization	
	Building capability	Closed shop Minimum standards or below	Statutory rights only	Building rights, responsibility frameworks and competencies Stimulating innovative, learning and people-empowering	Continual reappraisal and learning Encourages and values diversity	Recognizes and rewards sustainable actions Internal cohesion and common	
	Key management issues, e.g. supply chain	Lowest price suppliers Latest possible payment	Supplier rating scheme based on technical compliance, cost and delivery time	Broadened criteria of selection, to include SD, SR and environmental factors	Community of interest fully recognized where necessary	Assistance given to lower tiers	
	Environmental assessment	Minimum awareness Defensive posture	Standards not embraced Ad hoc solutions	Education and training Apply environmental policies and external standards	Environmental impact/risk assessment/audit decision making and valued	Comprehensive, integrated in Prevention rather than cure	
Transparency	Review	Not valued	Minimal systems in place Conventional reporting	Analysis of needs Integrated system design and planned dissemination	Periodic review and adjustment	All necessary recipients served	
	Reporting and building confidence	Little or none unless pressed	Minimal or as required	Selective to determined ends	Legitimate stakeholders (internal and external) receiving regular and appropriate reporting Building understanding in the stakeholder community, seeking to explain decisions and implications, and wider long-term education beyond Building trust and confidence		

**Annex B (informative)**  
**Supply chain management****B.1 What is sustainable procurement and why is it required?**

Successful implementation of sustainable event management depends on the sustainability objectives being extended throughout the supply chain. This requires engagement with a wide range of suppliers, from specialists to non-specialists. The following section provides information on sustainable procurement and a checklist of potential issues is provided in Table B.1.

Sustainable procurement is the integration of sustainability management into all aspects of the procurement cycle including:

- a) defining the need for sustainable procurement;
- b) evaluating possible options;
- c) design and specification;
- d) supplier selection;
- e) tender evaluation;
- f) post-contract management;
- g) supplier development; and,
- h) performance review.

Four key aims should be addressed when integrating sustainability management into the procurement process:

- 1) minimizing the impacts of products and/or services (e.g. impacts on health, air quality, generation of hazardous waste);
- 2) minimizing demand for resources (e.g. by using resource-efficient products such as energy efficient appliances, fuel efficient vehicles and products incorporating recycled content); and,
- 3) minimizing the negative impacts of the supply chain itself, in particular the social aspects (e.g. giving preference to local and/or smaller suppliers and those that meet minimum ethical, human rights and employment standards);
- 4) ensuring that fair contract terms are applied and respected.

**Table B.1 – Sustainable procurement checklist**

Categories of issues for consideration in sustainable procurement	Have the issues been considered? (Y/N)
<p><b>Corporate commitment – sustainable procurement</b></p> <p>Is there organization-wide consensus on the approach to sustainable procurement for event management projects?</p> <p>Is a senior procurement director or manager responsible for implementation of sustainable procurement and have adequate resources been allocated?</p>	
<p><b>Policy for procurement and strategic planning</b></p> <p>Has a procurement policy been defined, documented and communicated?</p> <p>Has a sustainable purchasing strategy been defined and adopted, and is it widely understood?</p> <p>Is the role of the procurement function defined in terms of achieving organizational sustainability targets?</p> <p>Are policies/codes of conduct/guidelines/minimum standards used to demonstrate what the organization will/will not buy?</p> <p>Are the most important categories of procurement identified for targeted action?</p> <p>Are future procurements mapped?</p> <p>Is the purchase core to the business?</p> <p>Are there a limited number of suppliers?</p> <p>Will the company suffer negative PR in the event of supply failure?</p>	
<p><b>Does the scope of the sustainable procurement strategy cover...</b></p> <p>Economic issues, social, health and safety, environmental and natural resource issues?</p>	
<p><b>Do the sustainability objectives embedded within procurement...</b></p> <p>Promote positive sustainability outcomes as well as managing negative impacts?</p> <p>Demonstrate concern for, and effort to maintain and build reputation?</p> <p>Assist in incorporating sustainability values into supplier strategies and develop performance measures for mutual benefits (e.g. innovation, cost reduction, quality enhancement, increased flexibility, compliance and proactive risk management)?</p> <p>Contribute to national policies by stimulating markets for sustainable goods?</p> <p>Take the form of a tender specification and, where necessary, additional guidance?</p>	
<p><b>Are targets/KPIs...</b></p> <p>Linked to the overall organizational sustainability objectives?</p> <p>Compliant with legislation as a minimum, at industry best practice standards?</p> <p>Related to a defined outcome?</p> <p>Driving real improvements through the supply chain?</p> <p>Transparent?</p> <p>Where applicable, based on sound science?</p> <p>SMART (specific, measurable, achievable, realistic, timebound)?</p>	
<p><b>Assessment criteria</b></p> <p>Has a weighting/scoring system for supplier/tender evaluation been developed?</p> <p>Have life cycle impacts and whole life costs issues been considered?</p> <p>Has the environmental purchasing hierarchy been applied?</p> <p>Is the supplier prepared to sign up to a supplier code of conduct?</p> <p>Does the supplier meet industry best practice standards?</p> <p>Does the supplier represent best value?</p> <p>Are the contract terms fair?</p>	

**Have best practice tools / techniques etc. been incorporated, such as...**

A supplier code of conduct? If so, does the scope of this code include:

- child labour?
- forced labour?
- health and safety?
- freedom of association and collective bargaining?
- discrimination?
- disciplinary practices/harsh and inhumane treatment?
- working hours?
- remuneration and benefits?
- personal management systems?
- employment security?
- community relations?
- environmental issues?

Policies/codes of conduct/guidelines/minimum standards?

The environmental purchasing hierarchy – “rethink, eliminate, reduce, re-use, recycle, dispose”?

Checklists and specifications?

Lists of pre-approved materials?

Involvement of sustainability personnel in contract negotiations?

Supplier development programmes to set requirements, form action plans, provide support and monitor progress through performance reviews?

Supplier audits and/or frequent supplier visits?

Integration with existing procurement tools such as total life costing, supplier performance classification and ratings, quality procedures, terms and conditions and Total Quality Management?

Contractual requirements providing detail on sustainability standards and contract “milestones”?

Pilot programmes to try out new sustainable products/services

Work with R&D to solve sustainability problems

Supplier training and seminars/presentations etc

Inclusion of “eco labels” or “eco label” criteria in specifications

**Dialogue with suppliers**

Is a combination of the “command and control” and “partnership” supplier relationship approach used?

Do contractual terms with suppliers reflect equal capacities to contract?

Are communications with suppliers non-adversarial?

Are expectations and roles within the communication clear?

Have the suppliers been consulted regarding the communication?

Are positive communication actions rewarded?

Is dialogue between the organization and the supplier bases set up at an early stage?

Are suppliers encouraged to be innovative with sustainable product options?

Are variants to specifications considered in order to encourage performance improvements beyond functional specification?

Are both “winning” and “losing” suppliers constructively debriefed?

Are new bidders introduced for each invitation to tender (ITT) to facilitate competition?

Has the organization, where necessary, engaged with trade/industry bodies to assist with defining specifications, best practice, etc?

<p><b>Has sustainability management been incorporated into the procurement cycle stages, including:</b></p> <ul style="list-style-type: none"> <li>Defining the service need: developing the programme or project brief?</li> <li>Developing the business case: appraising options and establishing value for money?</li> <li>Defining the procurement approach: specifying the requirements?</li> <li>Competitive procurement: inviting and evaluating bids and selecting the supplier?</li> <li>Award and implementing the contract: prepare for delivery?</li> <li>Manage the contract: maintaining performance, value for money and fairness?</li> <li>Reviewing the key decision points in the procurement cycle?</li> </ul>	
<p><b>Monitoring and reporting</b></p> <ul style="list-style-type: none"> <li>Is the strategy implementation monitored through appropriate performance measures, KPIs and benchmarks?</li> <li>Is information collected during the monitoring process assessed, reported and acted upon?</li> <li>Are the lessons learned documented and possible improvements identified for future activities?</li> </ul>	

## **B.2 When should sustainable procurement issues be considered?**

Sustainability issues should be considered at the earliest stage of the procurement process by building relevant criteria into product/service specification. This allows options to be selected that meet the specification but that also provide the best value for money. This approach avoids potential conflicts between sustainability and economic issues arising later in the procurement process.

## **B.3 What does sustainable procurement involve?**

Key steps that should be undertaken are:

- a) establishing a policy for sustainable procurement;
- b) producing tender specifications that incorporate sustainability performance criteria;
- c) engaging in dialogue with suppliers/potential suppliers; and,
- d) assessing tender submissions and evaluating sustainability performance throughout the procurement cycle.

## **B.4 Sustainable procurement policy and strategic planning**

A procurement policy should be established and documented that is aligned with the sustainability policy for the event as a whole and which elaborates on (in the context of sustainable procurement) the issues, objectives, KPIs and targets established for the event as a whole. The sustainable procurement policy should:

- a) define the scope (i.e. extent) of sustainable procurement, e.g. economic, social, environmental and natural resources; life cycle approach, key event themes, etc;
- b) state the desired performance level, e.g. basic legal compliance or extend to 'beyond best practice' including building environmental values into supplier strategies;
- c) define the approach/criteria for assessing suppliers during tender evaluation;
- d) assess consistency and alignment of performance requirements for suppliers with the organization's expectations for itself.

### **B.5 Techniques for assessing and managing sustainability issues in procurement**

The following considerations should be taken into account in defining the approach to assessing/managing suppliers and prospective suppliers.

- a) The extent to which the supplier's products/services are critical to the purchasing organization;
- b) The level of expenditure on suppliers in order to establish the degree of influence that can be exerted on suppliers;
- c) The key social, economic, environmental and natural resources issues and associated risks relating to the product/service;
- d) Separating suppliers by industry, service or product type in order to develop appropriate means of communicating / engaging with them.

The organization should select from appropriate approaches, tools and techniques to assess and manage sustainable procurement. These include:

- 1) weighting/scoring systems – quantitative/qualitative ways of assessing the merits of proposed solutions applied to the KPIs;
- 2) life cycle assessment and whole life costing: the “true” impacts of products and/or services based on a “cradle-to-grave” approach i.e. a holistic approach which assesses the environmental aspects and potential impacts associated with the manufacture, use and disposal of a product
- 3) the environmental purchasing hierarchy – “rethink, eliminate, reduce, re-use, recycle, dispose”, an approach to minimizing natural resource impacts which is similar to the waste management hierarchy;
- 4) supplier code of conduct – can be employed by the contracting organization in order to ensure that their suppliers conform with the social and ethical elements of sustainable procurement, as well the environmental aspects;
- 5) industry best practice – standards for sustainability management for specific industry sectors/areas defined by the industry and representing the industry's assessment of appropriate performance levels; and,
- 6) best value – using the UK government definition; the optimum combination of whole life costs and benefits to meet the customer's requirement. This approach enables sustainability and quality to be taken into account when service delivery options are being considered.

### **B.6 Developing a dialogue with suppliers**

There are two broad approaches that can be used to establish sustainability goals for suppliers; the “command and control” approach and the “partnership” approach.

*“Command and control” approach:* This approach involves close management and regulation of suppliers and includes the use of a contract that includes standards and checklists which organizations may insist their suppliers must comply with. Although it can be effective, it can also be inflexible by making suppliers react to precise requirements rather than proactively engaging with the objectives for sustainability. This sometimes leads to a “tick box” approach whereby the supplier takes the minimum measures to meet the performance standard required.

*“Partnership” approach:* This approach involves relationship building with the supplier and uses influence, information and education with the aim of ensuring that both the supplier and the organization are working towards similar goals. In the long term, the “partnership” approach tends to be more effective than “command and control, however, it requires more effort and investment. Where particular products and services are required on a routine basis, it might be most appropriate to invest in the “partnership” approach.

It is likely that organizations will adopt a combination of the above techniques.

A designated sustainable procurement champion should be responsible for future procurement contracts and developing early dialogues with the suppliers, in order to anticipate implications associated with changes in requirements, supply, legislation, etc. Rather than being too prescriptive, contracting organizations should encourage suppliers to develop variants in order to provide suppliers opportunities to develop new, innovative sustainable product/service options. This approach is also particularly useful where the buyer lacks the necessary knowledge of the product/service to provide a meaningful specification.

Feedback should be given to suppliers at the end of the procurement cycle to inform the review process. New bidders should also be sought at the invitation to tender (ITT) stage to promote supplier competition. Where the contracting organization is constrained in terms of entering into dialogue with suppliers, or lacks the competence to provide a specification to suppliers, the organization should approach representative trade bodies/organizations for assistance.

#### **B.7 Assessment of tender submissions**

Tender submissions should be evaluated using the criteria and assessment techniques outlined previously. Once the preferred supplier has been selected, the contracting organization should incorporate the sustainability performance information provided in the supplier’s tender submissions into the conditions of contract. Sufficient detail should be included to be able to determine instances of non-compliance (i.e. where suppliers have failed to achieve expected performance) and to inform subsequent performance reviews.

#### **B.8 Sustainable procurement – monitoring and reporting**

The strategy implementation should be monitored throughout the implementation stage using appropriate KPIs and benchmarks. Information collected during the monitoring process should then be assessed and reported upon. The “lessons learned” should be documented and incorporated into the review process to identify improvements for future activities.

## **Bibliography**

### **Standards publications**

BS 8406, *Event stewarding and crowd safety services – Code of practice*

### **Other publications**

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