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Ethics Officers & Event Planning Using Project Management

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ACTION RESEARCH PROPOSAL

Assisting IDC in Performing More Efficiently and Effectively

Abstract

This project reveals process improvements for Integrated Diagnostic Center in Denver, Colorado. Through methods including, surveys, interviews, and observations program improvement will be achieved. This is a proposal to conduct action research.

Assisting IDC in Performing More Efficiently and Effectively

Integrated Diagnostic Center (IDC) is a new company and all procedures have been created on an as needed basis. It is the belief of the researcher that there are a lot of rework issues and there may be some more efficient and effective ways to run the office. The researcher has also had physician office employees express some dissatisfaction with IDC. A comprehensive look was taken at how all day-to-day activities are done at IDC in Denver, Colorado. This study focused on staff responsibilities and increasing physician office satisfaction. There were two major areas of emphasis for the efficiency plan project. The first goal was to increase doctor office satisfaction with IDC. This was done with an introductory survey that was conducted with the offices to find issues for improvement. Then the allocation of staff responsibilities was researched to ensure process flow is effective. This action research project will help IDC construct an efficiency plan for the office in Denver, Colorado.

Background of Integrated Diagnostic Center

Integrated Diagnostic Center (IDC) is a fairly new company that resulted from a company called Corda Medical Care. Corda specialized in heart related health problems and had set up centers that had catheter laboratories and nuclear cameras. Corda was experiencing rapid growth for their first two years of business and were planning to go public. In the late 1980's Corda Medical Care started to have some funding problems. Corda was a practice management company that was venture backed. Then, Phycor, which was a medical care leader, missed their earnings. This resulted in Wall Street losing optimism for medical companies and Corda's hopes of going public were lost. Corda was forced to sell back all of their assets, everything from medical equipment to chairs, in order to pay off their debt. After the close of Corda Medical Care, a few of the executive leaders in Corda took 6 months off to write a new business plan. During this time they did a lot of research to find out what kind of medical imaging was most needed. They checked legal compliance in different states, anti-kick back fraud issues, and what different vendors were offering. They figured depreciates costs for equipment and hired a manager of project development to help them evaluate their product line. After all the research was done they decided to open an imaging center that would specialize in nuclear camera, diagnostic, and ultrasound. They decided to call the center Integrated Diagnostic Center (IDC). IDC's first contract was signed in August of 2000 and the center in Las Vegas, Nevada opened 6 months later. Their second center opened in Houston, Texas and their third in Denver, Colorado. These three centers have all been very successful and have all turned profits in their first year. Since opening their first center, IDC has revised their business plan and have put in to action plans to open up to 5 more centers in Dallas, Austin, San Antonio, and another in Las Vegas and Denver.

History of the Competitive Environment

IDC in Denver does have a competitive environment. There are 6 other diagnostic centers in the Denver metro area and the concept is fairly easy to copy. Contracts are relatively short being 1-3 years, giving more importance to developing a good relationship with the doctor offices from the start.

Problem

The Corda executive leaders did extensive research for IDC's business plan. By the time they opened IDC in 2000, they had a very clear plan for their offerings and specialization. However, there was not such a clear plan for the office procedures. IDC in Denver created such procedures as employee job responsibilities, scheduling, and results reporting on an as needed basis. Most of the time they did not research the most productive ways of accomplishing these tasks. Doctor office satisfaction was suffering and it was clear there needed to be some clear procedures that were efficient and effective for the Denver office and possibly company wide.

Problem Statement. IDC is experiencing dissatisfaction from referring doctor offices and difficulty in scheduling appointments effectively. There is also confusion on job responsibilities. The purpose of this action research project is to find out the causes of these problems and find solutions that are the most effective and efficient for the company.

Literature Review

There will be many literature sources used in this action research study. They are divided into three areas, customer satisfaction and retention, process flow and improvement, and leadership.

In developing customer satisfaction and retention, Johnson reports that there are "three basic strategies for successful quality management: use reference models or benchmarks, set priorities for quality improvement, and focus your resources (p 22)." Johnson also says that you have to learn how the customer views your company and to do this you must think like the customer and not the organization (p. 50). When developing the initial surveys and interviews, which is qualitative research, you should "identify a comprehensive range of issues that potentially drive satisfaction, loyalty, and profitability (p 51)". After discovery of customer satisfaction issues, Johnson suggests many steps to implement change. One of these suggestions is to use Quality Function Deployment (QFD). "QFD is mainly a tool to help companies focus on what customers perceive as important and certify that these desired abilities exist in the final product or service (p 151)". There are two parts to QFD, the first is a list of attributes that customers see as important. The second part is a monitoring part that "ensures that areas with a high impact on customer satisfaction are controlled throughout the production or service delivery process (p 155)". Brown (1995) discusses how to keep the customers that you have, by taking just a few measures. Brown reports that companies can improve customer satisfaction by knowing the marketplace, using technology, and listening to the customer (p 23). The author stresses that knowing the customer is the key to customer satisfaction. The author also says that companies, who survey their customers on their satisfaction, generally improve the overall customer satisfaction. The last point the author makes is satisfying the internal customers can also lead to satisfying the external customers. Forseter (2005) gives information on improving customer satisfaction. It discusses when Federated Department Stores started listening to the customer; their customer satisfaction rating went up 4.2%. A statistic on the importance of customer satisfaction was "customer satisfaction levels dropped by 3.2% from a year ago for bricks-and-mortar stores and 4.8% for e-commerce sites" the last source for customer satisfaction and retention was 'Turn Customer Satisfaction into Loyalty: These 10 Simple Tips will Transform Satisfaction into Loyalty' in *Selling.* This article was a top ten list of how to create loyalty in customers. The article discusses how it is important to 'delight customers', not just satisfy them. The article reports, "A survey conducted by the White House Office of Consumer Affairs revealed that 68 percent of customers who defected, told researchers that they plan to never return to a company where they "perceived an attitude of indifference or discourtesy on the part of the supplier (14)."

The next section in the literature review is process flow and improvement. The first source for this section is by Yano. Yano talked about two researchers who studied 16,000 patients in two hospitals and found that all of these patients could be divided into 8 different types of patients. From that determination, the researchers developed a process flow chart that helped hospital workers know the next steps and tests the patients would need. This research will be used to show process flow can be improved by doing research within your own organization. Piaw also suggests Process Activity Mapping. Process Activity Mapping results in a map that uncovers waste (p 70). After the identification of waste, an, “improvement to the existing process can be made (p 70)”. “This tool is similar to the basic process mapping tools in TQM literature, but with an emphasis on mapping the processes that affect the flow of the products through the supply chain (p 70)”.

Comment:

The next source for process improvement is ‘The Value of Learning’ in *Works Management.* This article was about an award that TBM Consulting Group won. The award is the Most Improved Plant Award. The article talks about why this award was won by TBM and why it is important to have this type of award. The article then discusses TBM’s Lean Sigma approach to aspects of their business. Lean Sigma is ‘lean thinking’ with the six-sigma approach. It is described as, “producing benefits of both methodologies, at a much faster rate then traditional six sigma projects.” TBM teaches Lean Sigma in courses and workshops for their employees and have seen great results using Lean Sigma. The next source is ‘Goal Based Learning and the Future of Performance Management’ in *Public Administration Review.* This is an article is about government results based management in areas like budgeting and performance management. The article talks about managing for results (MFR). The theory of MFR is that managers need to incorporate this strategy but its more effective for broad issues then complex issues. The author also breaks down two types of learning for managers. They are single, where learning leads to improvement, and double, where learning results in change in values. The article then gives some case study examples with the two types of learning. The last section in my literature review is Leadership. The first source used for leadership was ‘Leaders are Teachers’, in *Leadership Excellence.* This article was about the importance of creating not just strong leaders but great teachers for organizations to be successful. The article gives a top 10 list of how a company can promote great teachers. I also will include a book by Peter Northhouse, *Leadership; Theory and Practice.* (2nd Ed.). , This book reports, “Excellent teams have developed a sense of unity or identification. Such team spirit can frequently be developed by involving members in all aspects of the process (Northhouse, p 25).” This book will help me to incorporate leadership and team development.

This is the beginning of my literature review and as the project progresses; I will incorporate many more experts’ teachings.

Method

The methods section to help IDC to become more efficient and effective will be a brief overview of action research and the action research model that will be used to solve the problems IDC is experiencing. A discussion will also detail how the researcher will gain entry to the problem and who the participants are as well as who will be on the collaborative team. A timeline and data gathering methods that will be used will also be discussed.

Action Research Methodology

Action Research is “a process of diagnosing, taking action, diagnosing, and taking new action (French & Bell, 1995 p 4)”. It can be described as “a mixture of three ingredients: the highly participative nature of OD (organizational development), the consultant role of collaborator and co-learner, and the iterative process of diagnosis and action”. Action research was chosen to solve this problem because, “[It] attempts to meet the dual goals of making action more effective and building a body of scientific knowledge around that action”. “Action in this context refers to programs and interventions designed to solve problems and improve conditions”.

Action Research Model

The action research model steps that will be used in this project are "problem identification, data collection and collaborations by a participatory group or internal members of an organization and the researcher(s) who share a jointly vested interest in solving the problem and improving the situation (French & Bell, 1995)".

According to French and Bell, one of the main sources of action research was from social psychologist, Kurt Lewin. Lewin was very interested in applying social science knowledge to solve social problems. In the mid 1940's and early 1950's, Lewin and his students conducted action research in many different behavioral domains. Lewin strictly believed that there should be, no action without research, and no research without action.

The model of action research that will be used is Burke's adaptation of French's model from the Regis University 693 Modual. It is described in Table 1. This model was chosen is because the researcher is considered an outside consultant but will work collaboratively with the IDC employees to jointly resolve the problems. It is important to have an outside consultant do that data collection to maintain objectivity. This model is effective for an outside consultant because it allots the steps of feedback to the client and joint action planning.

Table 1

Burke's Adaptation of W.L French's Action Research Model.

Step #	Activity
Step 1	Perception of the problem
Step 2	Enter Consultant
Step 3	Collect data
Step 4	Feedback given to client

Step 5	Joint action planning
Step 6	Action
Step 7	Assessment with data collection, return to step 4 for feedback

Note: Regis Module Appendix C

Entering and Contracting

Initial participants in this action research project will be myself as the researcher, and the center manager of IDC in Denver, Carol Beehler. Carol will assist me in any corporate information needs as the action research is conducted. There are staff members in the Denver office and 14 have agreed to participate in the action research project. These participants will be the collaborative team. The collaborative team will be able to provide information dealing with the office operations. The importance of buy in and team effort for the project is very great. The collaborative team is very important to the project and team building will be done to ensure the team performs highly. Finally, doctor offices that use IDC will be the last participants. They will be surveyed to find issues and needs that they might have with IDC. There will be five stages to this action research project. They are data gathering, data evaluation, pilot program development, pilot program evaluation and revision, and operations change. The data gathering will be conducted for three months. Data evaluation will be completed within one month of completion of data gathering. The pilot program development will occur for three weeks. The pilot program evaluation and revision will be completed in three weeks, and finally the operations change will be completed in two weeks. Six months after the operation changes have been made, follow up surveys and interviews will be done to conclude the success of the project. Table 2 describes the time chart for the project.

Table 2

Timeline for Action Research Project

Activity	Timeline
Data Gathering	Three months
Data Evaluation	One month
Pilot Program Development	Three weeks
Pilot Program Evaluation & Revision	Three weeks
Operations Change	Two weeks
Surveys and Interviews	Six months after Operations Change

Data Gathering Methods

Data gathering instruments that will be used are surveys, interviews and observations. Surveys will be done immediately and followed up by interviews. Observations and then interviews will be done next and then repeated after the pilot program is in place.

Surveys. There will be a Likert scale survey distributed to all IDC Denver Staff and doctor offices that use IDC. A copy of that survey will be in Appendix A. This survey's purpose will be to show the satisfaction level with operations for users of IDC and to build a relationship with the doctor offices, which are IDC's customers. Building a relationship with customers is a very important thing. "This includes responding to any suggestions [customers] make to improve the product [or service] (Nickels, 1996)". After the survey is completed, it will be easy to see areas that the users, would like to see improved. That information will be a good starting point for research to conduct.

Observations. Observations will be done on how the back office work is performed. The researcher will spend two weeks observing the employees at IDC and how they perform their job functions. The center manager has approved the observations and employees will be fully aware of the dates and time frame of the observations. The back office employees of IDC are part of the collaborative team and they will be aware of the importance of the observations to the project. Observations will be done because the "findings are considered strong in validity because the researcher is able to collect a depth of information about a particular behavior (Brown L)." Generalizations can be considered a problem with observations. Careful consideration will be taken to ensure generalizations will not be made to quickly.

Interviews. Interviews will be performed to find out more specific areas that need further information. These interviews will be done in the performance analysis stage because they tend to be most useful at that time in finding out what the performance deficiencies are (Regis Handout, 2005). Interviews validate surveys so these interviews will validate the first survey's findings. Validity and Reliability are very important in action research. Validity refers to the "extent to which the data we collect gives a true measurement". Reliability is when the same results and found by different researchers asking the same questions in different ways. Reliability will be gained by using the combination of data gathering instruments to answer the same question of where the problems lay within IDC. Interviews will be given to the same collaborative group, as needed, as well as informal interviews with the doctor offices. All interviews will be semi structured and tape-recorded. To put interviewees at ease they will be told the purpose of the interviews as well as that their answers will be kept confidential.

The surveys, company records and observations, and interviews will provide triangulation for action research. Triangulation is ensuring that where one data-gathering instrument has weaknesses, another will have strengths to make up for the weaknesses (Regis). 'A combination of different data gathering methods' will give the researcher a much better and more rounded picture of where improvements can be made. This project uses theory triangulation because it uses “different theoretical perspectives to examine the same data (Regis)”. There will be “one researcher using two or more research techniques. Using triangulation will ensure that any information collected is accurate. The surveys, interviews, and observations will show areas that IDC can perform more efficiently and effectively. The data will be crucial to develop a pilot improvement program. After action research has been conducted and a pilot program is implemented, another survey and interviews will follow.

Summary

After all five stages of action research have been completed and the revised pilot program is implemented, the action research project will be completed. This project will increase doctor office satisfaction with IDC as well as ensure process flow is efficient in company operations. I am looking forward to the results and to the very efficient and effective IDC.

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Appendix

Survey Cover Letter

To: IDC Customer,

IDC has developed a survey to find out how to serve our customers better. Please take 5 minutes to fill out the enclosed survey. We really appreciate your time and we will take careful consideration of each of your answers. If you have any questions or concerns, please do not hesitate to call us at 303-433-0302.
Thank you very much in helping us to assist you better.

Sincerely, The IDC Staff

COMPREHENSIVE QUESTION 1

Ethics Officers are becoming the wave of the future with an unprecedented amount of companies hiring ethics officers in the last three months (Rich, 2005). Define the position of 'ethics officer'. Discuss the role and importance of these officers in upholding ethical standards within their organizations. Evaluate the significance of ethics officers in small companies. Identify issues that small companies face that an ethics officer would address. In small companies, leaders often wear many hats because of limited resources. Would it be more beneficial for these companies to hire an ethics officer or to depend upon leaders to enforce business ethics? If leaders were to have the responsibilities of an ethics officer, which type of leader would be the best candidate?

Abstract

This paper gives the definition of an ethics officer as, "functional responsibility for establishing and maintaining compliance with the code of ethics" (Calhoun & Wolitzer, 2001, p. 72). It details the responsibilities including "analyzing the company's process for ethical decision-making, creating an environment that supports ethics, establishing ethical standards, determining how best to communicate those standards, and maintaining oversight of the ethics process" (Calhoun & Wolitzer, p.72). The paper discusses considerations, or cautions, an ethics officer must be aware of and discusses reasons employees act unethically including the abuse of power and conflicts of interest. It details the importance of ethics officers to all size organizations. The paper gives a discussion of using an ethics officer versus on-the-job ethics training, explaining why employing the ethics officer is in the best interest of companies. Finally, the paper explains that a Chief Operations Officer in an organization would be in the best position to perform the responsibilities of an ethics officer.

Ethics Officers

Ethics officers are becoming the wave of the future with an unprecedented amount of companies hiring ethics officers in the last three months (Rich, 2005). This paper will define the position of an ethics officer, detail their responsibilities and considerations, and discuss the importance to large and small organizations. The paper will also evaluate the significance of ethics officer in smaller companies and identify issues that small companies would have that an ethics officer would address. This paper will also discuss the need of an ethics officer and which leaders would carry the responsibilities of ethics officer.

In the past years, there has been a lot of corporate scandal, with scandals at Enron, Anderson Consulting, Ford Motor Company, and Qwest Communications. Some believe that, “Corporate America’s response to these ethics problems has been in part, the ethics officer” (Morf, 1999, p. 265). The purpose of this paper is to examine the best option for small companies with limited resources in respect to ethics training or an ethics officer. The paper will discuss the role of an ethics officer and why organizations need an ethics officer. The paper also examines what makes a small organization differ in their ethics needs and determine if it is more beneficial to have a COO/CFO/CEO take on that role or is it better to hire a formal ethics officer.

Ethics Officers

To better understand what an ethics officer is, it is important to understand its background. There are two theories of when the corporate ethics officer came to be. Gary Edwards, past President of the Ethics Resource Center, a non-profit consulting firm, says that General Dynamics developed the ethics officer position in 1985. “General Dynamics was under government investigation for billing improprieties and, in order to shore up what was left to its good name, turned to Edwards and his firm for help. The result was the establishment of an ethics office and now famous, 1-800-ETHICS, hotline for employees to report ethical problems to top management anonymously" (Morf, 1999, p. 265). Another wave of attention was in the early 1990s after "the United States sentencing guidelines promised decreased fines for firms that adopted ethics programs" (Swartz, 2003, p. 9). Large companies are starting to understand the importance of ethics. Schwartz (2001) reports that, "ninety percent of large companies have a code of ethics" (p. 247). Schwartz also believes that that percentage will be higher in the years to come because of public and government pressure. Very large companies are realizing the importance of ethics officers, and treating them to high-level positions. "Lockheed Martin's ethics program is a Vice President of Ethics and reports to the CEO and directors. Every division of the company has an ethics officer whose full-time job is to promote ethics and monitor employee concerns" (Fombrun & Foss, 2004, p. 284). Other companies have appointed Chief Ethics Officers including Dell in 2000, MCI in 2003, and the U.S. Food Service in 2004. There is even an ethics officer association that was started in 1992 by a small number of ethics officers (Fombrun & Foss). The Ethics officer Association has increased to over 995 members (Fombrun & Foss). Over fifty per cent of the members are part of Fortune 500 companies and are from over 160 countries.

Definitions

The definition of an ethics officer is a person who has "functional responsibility for establishing and maintaining compliance with the code of ethics" (Calhoun & Wolitzer, 2001, p. 72). John Carver (2003) believes an ethics officer can also be considered an internal auditor. Carver believes it "makes a lot of sense to check on management" (p. 5). An ethics officer, or internal auditor, insures management, as well as all levels of a company, is checked on. Understanding the position of ethics officers requires a good understanding of the definitions of ethics. The definition of ethics is the "standards of conduct and moral judgment" (Nickels, McHugh & McHugh, 1996, p. 117). "Ethics are the moral principles that individuals inject into their decision making process, and that helps temper the final outcome to conform with the norms of their society" (Morf, 1999, p. 265). In layman's terms ethics is doing what's right. Determining what is right is another story and all comes down to ethical behavior. Ethical behavior is a large part of ethics, however, "there is no universal definition of ethical behavior, and what is considered ethical may change over time" (Scarborough & Zimmerer, 1996, p. 87). Ethical behavior should be defined by each individual and then compared to the companies' code of ethics to ensure compliance.

Responsibilities

An ethics officer has a wide variety of responsibilities. Some of these responsibilities include, "analyzing the company's process for ethical decision-making, creating an environment that supports ethics, establishing ethical standards, determining how best to communicate those standards, and maintaining oversight of the ethics process" (Calhoun & Wolitzer, 2001, p.72). They also include, "investigating alleged violations of the law, evaluating the company's adherence to its formal ethics code, and advising top-management as to various moral and ethical issues" (Morf, 1999, p. 265). Calhoun and Wolitzer (2001) say that ethics officers use three things to ensure compliance of high standards of ethics. Those three things are prevention, detection, and action. Training employees is part of the prevention and listening to employees, using various means, is part of the detection. "Action means responding to any ethical concern or unethical conduct through discussion, reprimand, requirement of additional training, or, in cases of serious violations, termination" (Calhoun & Wolitzer, 72). Ethics officers also deal with issues such "sexual harassment, deceptive sales practices, drug testing, compliance with federal regulations, and training" (Petry & Tietz, 1992, p. 22). After an ethics officer understands the responsibilities, it is also important for them to know some obstacles that they face.

Obstacles

Resistance. Ethics officers are not accepted by all organizations and there are considerations that an ethics officer must be aware of. Members of Congress opposed the bill of the 'Ethics of Government Act of 1978' (Thompson, 1992). They were afraid that the ethics officers would be a policing of the act and look for violations. However, "This federal mandate has motivated companies to develop codes of conduct" (DeGeorge, 1999, p. 609-610). The mandate has also influenced companies to create high-level positions for the ethics officers to make sure compliance with the ethics code is adhered to. The ethics officers enforce the code with discipline and consistency. "Congress reasoned that if firms institute ethics in their structures in this way, employees would be less likely to break the law for the companies' benefit" (p. 609-610). Thompson (1992) discusses employees' disgust with ethics officers in government because there are more important issues to be worked on, for example, the Middle East conflict, the economy, and so on. However, Thompson argues that, "because other issues are more important than ethics, ethics is more important than any issues" (p. 254). This is an interesting thought, and implies that ethics is the most central issue to companies today.

Authority and access. There are other obstacles that ethics officers face. The first is they must take into account is that they must have access to all levels of the organization so no employee feels like the ethics officer is above or below them (Petry & Tietz, 1992). They must also make their employees feel like they can and will uphold the ethics code of a company. Petry and Tietz discuss how to make sure employees feel like the ethics officer isn't all talk. Suggestions to avoid this are to make sure the ethics officer listens, and also acts on the companies' ethics rules, for example, the CEO doing community service, if community service is in the company's ethics code. An ethics officer must also be careful if they want to be involved in the investigation process. If they choose to get involved, they must be trained, have the resources, avoid favoritism, and follow guidelines to avoid lawsuits.

*Expenditur*e. The last obstacle for ethics officers is that they are expensive. "The budget for an ethics office, including staff and overhead, can run $1 million a year, says Craig Dreilinger, a consultant with the Dreiford Group, a Bethesda, Md., firm specializing in ethics" (Henricks, 1995, p. 54). In addition to that expense, ethics officers are also in short supply. There are 100 members in the Ethics Officer Association and they "represent a sizable fraction of experienced candidates--and even they are relatively new to their jobs" (p. 54). Many companies are looking to their human resources department to find candidates for the ethics office because of the lack of qualified candidates. "The legal, accounting, or security departments are also good training grounds, as long as candidates have good communication skills, a solid reputation for integrity and some experience with the company" (p. 54). Without an ethics officer, a small business would probably rely upon on-the-job training to address the issues of ethics. However, on-the-job training of an ethics officer is a questionable practice.

Reasons for unethical behavior

To understand the need for an ethics officer within organizations, it is imperative to understand the reasons employees and managers act unethically. "Unethical practices appear in many forms; besides outright fraud one finds unfair competition, unfair communication, non-respect of agreements and unfair attitudes towards and treatment of stakeholders" (Fassin, 2005, p. 267). The abuse of power and conflicts of interest are also two common unethical practices. Some reasons for these ethics code violations are self interest, dissatisfaction with job, the type of environment, companies' interests, and ignorance (Schwartz, 2004). Research has identified three major characteristics in which employees are tempted: (a) greed with hopes of profit, (b) competition, and (c) "the need to insure or restore some standard of justice that may have been violated" (Fassin, 2005, p. 271).

Role and Importance

The role and importance of ethics officers serves many purposes in upholding ethical standards within companies. These roles include financial and legal protection, encouraging employee confidence on the company's ethics stand, ensuring corporate social responsibility, and to learn from past mistakes. Two of the most important purposes for all companies to employ an ethics officer are to protect themselves financially and legally. "Unethical behavior is expensive. Discriminatory practices, negligent hiring, and product quality failure can incur large legal judgments. In the United States employee malfeasance costs companies $15 billion to $50 billion a year" (Hollwitz & Pawlowski, 1997, p. 203). Hollwitz and Pawlowski also report that workers that do not follow their organization's norms and rules account for thirty percent of companies' bankruptcies (p. 203). Furthermore, a law passed November 1, 1991, which "allows judges to reduce fines and sentences if a company has in place personnel and programs to prevent, investigate, and punish wrongdoing" (Petry & Tietz, 1974, p. 21). Krell (2004) reports that, "new amendments to the Federal Sentencing Guidelines encourage ethics officer to foster an ethical culture – an undertaking that requires stronger partnerships with human resources, legal, security, internal audit and other corporate functions" (p. 37). An ethics officer is a type of insurance that allows a company to protect themselves.

Every company has the need for an ethics official. Krell reports that all company levels are confronted by unethical temptations that will affect many stakeholders. All employees will be temped at some time in their career to do something unethical, however Fassin says that, “progress can be made with the effective implementation of the ethical discourse in companies” (Fassin, 2005, p. 265). Furthermore, employees are not as ethical in the workplace as much as one would think. “A study by the Ethics Recourse Center of over four thousand U.S. employees found that thirty percent of the employees had observed misconduct at work in the last year which violated the law or company policy” (Schwartz, 2001, p. 247). Additionally, less than half of the employees witnessing the misconduct reported it to anyone in the company.

There was a national business ethics survey that was conducted in 2003 that revealed companies with an ethics program had a much higher percentage of misconduct that was reported from within. If the employees had an ethics officer to report violations to or just to discuss ethical issues, the percentage of employees doing unethical business may drop. Also, employees from companies with an ethics program believed that violators of the ethics code would be held accountable. (Hamilton, Brooke, & Eric, 2005, p. 404). That belief alone could discourage unethical practices. Companies in this era have little room for error so employees need to know from the start that they work for an organization that has a formal ethics program.

Corporate Social Responsibility

The next reason of importance for companies to employ an ethics officer is for corporate social responsibility (CSR). CSR is defined as “the duty of organizations to conduct their business in a manner that respects the rights of individuals and promotes human welfare” (Manakkalathil & Rudolf, 1995, p.29).“Concepts such as CSR, triple bottom line, accountability, and sustainable development are gaining importance” (Fassin, 2005, p. 265). Pryce (2002) argues that CSR should apply to all organizations “regardless of size, sector or even ownership structure” (p. 140). Although employees do not always practice CSR, it is important to consumers. “The Millennium Poll of 25,000 consumers in twenty three countries, reports that consumers care more about the perceived corporate responsibility of their supplier or shop than either about brand or price” (Pryce, p. 140). This poll also reports that people want to work for ethical companies. Therefore, in order for companies to hire the best people they must behave responsibly.

Past Mistake Example

Every size organization needs to be aware of mistakes companies within their industry have made to learn from them. There is a real life example of an ethics lapse, within the Exxon Corporation, that will give us the final reason that an ethics officer is important to all organizations. Exxon made a decision that was harmful to Alabama in an effort to reduce costs (Hamilton et al., 2005). In March of 1994, managers made a decision to move 81 trucks of waste from Big Excambia Creek, Alabama to the small town of Campbell. Campbell had a facility adjacent to the small Louisiana community of Grand Bois. A 1980 federal law exempted all wastes produced in the exploration and production of petroleum products from being classified as hazardous (Hamilton et al., 2005). Exxon clearly knew the material that was being transported was hazardous because as material was loaded into the tanker to be transported, an employee was directly exposed to the liquid and suffered serious injury to his eyes and lungs.

Exxon managers made the decision to go ahead and transport the material anyway. They dumped the waste into shallow pits and mechanically stirred it so the water and other volatile compounds would evaporate. The dried residue would then be hauled to a disposal site and buried. However the material that was dumped caused many health problems to the town of Grand Bios. Senior employees as well as lower-level managers were involved and no one did anything to prevent the situation.

Exxon learned from the incident however, only after it cost them much time, money, and customers. Hamilton et al. reports that, “Senior executives may be better able to prevent such harmful decisions in the future if mid and lower level managers and their employees were more aware of the importance of raising ethical concerns” (p. 386). Companies can learn from big mistakes that other companies, large or small, have made concerning ethics.

Ethics Officers and Small Organizations

Small companies also need to consider an ethics officer for a variety of reasons that are significant and relevant to their size. Katie Sutliff, who is an ethics officer, says, “From our own research including the National Business Ethics Survey, we know that small organizations are much less likely to have the sort of formal ethics systems than larger organizations do”(Sutliff, 2005, ¶ 2). In addition, the Millennium poll discovered that “among smaller businesses, 62% of owner managers were influenced by their employees to be more socially active” (Pryce, 2002, p. 141). Given that statistic, 48% of small companies have no influence to be socially responsible. Social responsibility is a cornerstone to business ethics.

An ethics officer can be very significant to a smaller organization. Longenecker, McKinney, and Moore (1989) surveyed large and small companies about ethics issues. They found that small organizations were stricter about faulty investment advice, favoritism in promotion, acquisitions, misleading financial reporting and advertising. However, they had a greater tolerance of padded expense accounts, tax evasion, collusion in bidding, insider trading, discrimination against women, and copying computer software. This information seems like a good argument, alone, to employ an ethics officer.

Checks and Balances

Another significant reason for small companies to employ an ethics officer are small companies have fewer monitoring devices, such as call recording, time management systems, and email screening. These devices often help to keep employees ethical. Employees are more likely to have ethical lapses if they think no one is monitoring them. Longenecker et al. (1989) asked if small businesses have any problems that are unique to them and different than for large companies. The answer was that smaller companies "operate with less formality (p. 27)", and also operate with an entrepreneur's personality (p. 27). "One might also expect to find differences in the ethical environment, ethical precepts, and ethical perceptions in small business" (p. 27). Because of this answer, the significance of an ethics officer in a small organization can be very great.

Disadvantages

The advantages of small companies having an ethics officer are clear but there are some disadvantages. Small companies often operate on a much smaller amount of salary resources and therefore employing an ethics officer can become a struggle. The Center for Business Ethics Survey in 1992 uncovered that most organizations did not want to employ an ethics officer because they felt that had no ethics problems or they had other full-time employees that handled ethics issues along with their regular job (Henricks, 1995). Employers feel like they understand what ethical behavior is and how to explain it to their employees. "But they aren't convinced it requires a dedicated executive" (p. 53).

Ethics Training

Ethics training can be a viable option for an organization that does not have the resources to employ an ethics officer, such as a smaller company. "Ethics training is now widespread due to corporate scandals, compliance mandates, and legal risks" (Adkins, 2004, p. 4). These scandals have made ethics training a resurgent enterprise. Large companies are doing formal ethics training, where smaller companies tend to do on-the-job ethics training. There are some that are extremely in favor of on-the-job ethics training and there are some that are very against it. Verschoor (2000) is a supporter of on-the-job training and states, “Ethics training is exciting and demanding. It stirs the moral imagination. It's memorable. It's noisy and involving. [Ethics training] engages all the senses” (p. 24). Verschoor also says that good ethics training can give employees the ability to “recognize, appreciate, and resolve real ethical dilemmas” (p. 24). Employees can actually learn how to handle real life ethics challenges that will come their way by learning how to apply a decision-making template to different ethics questions. “When companies and employees apply a decision-making template, they learn not only how to think through complex situations but also how to explain the decisions they have made” (p. 25). There are many good things that happen for companies who provide ethics training. Companies let their employees know that they realize ethical dilemmas are in the workplace. Companies let the employees know that they understand they have difficult jobs. Companies give their employees tools to solve ethical issues on their own. Employees learn that talking about ethical issues with others can help solve the issue. “Employees practice using new words and concepts that allow them to really talk about ethics in a substantive way” (p. 25). Employees learn how to make the best ethical decisions, therefore, will not need someone watching over them.

Problems with ethics training. Ethics training has not always achieved what it sets out to do. It has “addressed external behaviors (one’s personality), rather than the root cause of inappropriate business practices and workplace behavior. This outward behavior by individuals is what one can define simply as character, perhaps best described as doing the right thing when no one is watching” (Martini, 2004, p. 54). Therefore, companies must provide training that will address the character of the employee. Verschoor (2000) says employees need to be able to talk about ethics issues openly. They are eager to talk about these issues and learn how to solve them. It is crucial for employees to understand their company's commitment to ethics. Hamilton et al. (2005) says that employees have little power to change policies, procedures, and culture if they are aware of their company's lack of ethics, (although, high-level managers do have the power). Hamilton et al. says that the Exxon ethics slip happened because of the company's ambiguity about priorities. Exxon's employees were more concerned with the bottom-line taking the necessary precautions to prevent such a spill. Exxon was more concerned with cutting costs and not their value statement. Hamilton et al. reports, "A closed culture, however, may create a block to ethical action called protection from outside intervention" (p. 401). This is an important point to consider when thinking about doing internal ethics training. A company that is too closed within themselves may miss important clues of unethical behavior. With the aim of efficiency, organizational blocks can prevent ethical action. A suggestion that Hamilton et al. gives to avoid this is to "insure that all levels of the organization attend to society's goals and values as well as to the corporation's goals and values. This would require not only training throughout the corporation but also a sustained commitment by boards of directors and top-managers to keep in touch with the changes in society's expectations" (p. 401). Internal ethics training can be done but it must be done very carefully and with much consideration in order for it to be effective.

Problems with results. Some companies "do not regard ethics training as constituting `proper' training but instead regard it as part of everyday life" (Joyce, McNulty, & Woods, 1995, p. 25). Joyce et al. says that interesting questions are unanswered. "For instance, whether small businesses undertake more informal training than larger businesses and whether this informal training is as valuable as more formal training. Again, the smaller establishments faced the biggest challenge in developing individual training plans for employees" (p. 25). Joyce et al. continues to say that every size organization needs to increase their ethics training but small organizations tend to be less involved and opposed to change. Joyce et al. believes that small organizations are not good at training in comparison to larger organizations. These are important observations because sometimes companies cannot recognize where their problems are. Joyce et al suggests small organizations have problems with ethics training not being as extensive as with a larger organization. Knowing this, smaller organizations can make the appropriate changes to help avoid this mistake. Joyce et al. also suggests that ethics training is very important for every size organization and without good ethics training a company is opening themselves up to many ethical, legal, and financial risks.

Assessment

The compelling reasons that support having an ethics officer are for financial and legal insurance, open lines of communication, corporate social responsibility, faith from employees about the importance of ethics to the organization, and avoiding past mistakes. The concerns of hiring an ethics officer are the expense to the organization and the lack of qualified candidates available. There are some key components supporting on-the-job training. The first is the popularity of on-the-job training due to past scandals. These scandals have resulted in many employers being in favor of on-the-job training. Next, employees are learning how to solve ethical dilemmas themselves, and finally, on-the-job training is producing results. There are also some concerns about on-the-job training. The first of these concerns is to make sure the training takes the considerations that it should, such as one's personality. Another concern is that the training communicates the importance of ethics from the organization.

Examining both sides, it is the belief of the researcher that the ethics officer position, instead of on-the-job training, is the best option for all companies of any size. The benefits of having this official far outweigh the benefits of on-the-job training and most of the benefits from on-the-job training can be achieved through an ethics officer. The financial constraints are a major consideration for a small company; however, the position of ethics officer could save the company considerable amounts on legal settlements in the future. Keeping open lines of communication is very important to any organization and even more important when it concerns ethics. An employee's faith in a company's stand on ethics can make a difference within a culture of an organization. Learning from mistakes that other organizations have made is valuable and relevant and free. It makes it all the more important for small businesses because, as mentioned above, the survey evidence reveals small businesses acceptance of padded expense accounts, tax evasion, collusion in bidding, insider trading, discrimination against women, and copying computer software (Longenecker et al., 1989). These ethical violations can cause a company to lose respect, customers, profit, or worse, put the company out of business. By having an executive in place to manage these responsibilities, an organization can overcome the concerns of having the added expense of this employee. In those instances where a company cannot afford an ethics officer whatsoever, on-the-job training would be the next best thing. In the occasion that a company chose on-the-job training, that company would have to choose an official that would best be able to enforce business ethics. This brings on the question of what type of leader would be the best candidate.

Best Candidate

This section examines three different executive leadership roles that will be considered to be the best candidate to fill the position of ethics officer. They are the Chief Executive Officer

(CEO), Chief Operations Officer (COO), and Chief Financial Officer (CFO). These are the top-managers within an organization. “Top-managers are responsible for the performance of the organization as a whole or, of one of its major parts” (Schermerhorn, 1999, p. 8). Furthermore, “the duty and responsibility for providing ethical high-performance leadership rests with executives and senior managers” (Spangenberg & Theron, 2005, p.1).

The CEO is generally “the executive who is responsible for a company’s operations, usually the president or the chairman of the board” (Anonymous a, 2005, ¶ 1). The CEO is “the executive with the chief decision-making authority in an organization or business” as well. In small companies the CEO is also considered the President of the company.

The COO is “the senior manager who is responsible for managing the company's day-to-day operations and reporting them to the CEO” (Anonymous b, 2005, ¶ 1). “A company needs a COO because the CEO is usually too busy to monitor production quotas and other factors on a daily basis”. The COO in some companies is also the president, but they are usually an executive or senior Vice President” (Anonymous c, 2005.).

The CFO is “the officer of a firm responsible for handling the financial affairs of a company” (Anonymous d, 2005, ¶ 1). “Many companies have phased out the COO position, parceling out corporate responsibilities to the CFO and operating responsibilities to division heads. To meet the demands of Sarbanes-Oxley for greater accountability, they have also shortened the CEO's line of direct responsibility by eliminating the COO slot” (O’Brien, 2005, p.26). However, O’Brien says the role is very important and to “create the position, if necessary” (p. 26). The CFO of a company is “the corporate officer primarily responsible for financial planning and record-keeping. In recent years, however, the role has expanded to encompass communicating financial performance and forecasts to the analyst community. The title is equivalent to that of a finance director with the CFO reporting to the CEO and is frequently a member of the board.

Best Candidate Qualities

Ethics is becoming a major issue to companies today. It doesn't matter what leader that is chosen as much as it matters that that leader posses certain attributes. Spangenberg and Theron (2005) discuss three pillars that are needed in every executive: (a) moral character, (b) ethical values being imbedded in the leader's visioning, and (c) morality of the choices and actions of the leaders and followers. Selecting just one executive to best perform the duties of an ethics officer, the COO would be the best candidate. Although some companies are phasing out this position, O'Brien (2005) states that it is a very important position and should be in all companies. The COO handles the day-to-day operations and then reports to the CEO or the board of directors. The office of ethics officer would also report to these areas and, accordingly, a COO would do the same. It is important for the COO filling the ethics officer position to remember "ethical leadership means preaching what you personally practice, and taking some risks" (Veiga, 2005, p.38). There are some guidelines that Abby Davidson (as cited in Sutliff) of the ERC Corporation recommends for development of the ethics officer position. These guidelines would also be useful to the COO who is defining a role as an ethics leader. The guidelines, in the form of questions, are, "What are the values and standards of behavior in this organization? Who is in charge of communicating those values and making sure that people adhere to those standards? How will the values and standards be communicated? How will we know if people are following the standards and living the values? How do we encourage people to follow the standards and live out the values? How do we deal with mistakes, misunderstandings, and misconduct? How do we measure and evaluate our performance as an organization?" (Sutliff, 2005, ¶ 3). The office of an ethics executive could and should be done by every executive or manager within an organization; however, the COO is head of operations and therefore the best candidate to fill this extremely important position.

Summary

In summary, the position of the ethics officer is defined as having, "functional responsibility for establishing and maintaining compliance with the code of ethics" (Calhoun & Wolitzer, 2001, p. 72). This paper has discussed the role and importance of ethics officers in all size organizations and in particular, small organizations. The true benefits of having an ethics officer have been discussed and decided it is more beneficial for small organizations to employ one. Finally, the COO is the leader that would be the best candidate to act as an ethics officer, if the office of ethics officer was not filled formally within a company.

Future

Petry and Tietz (1992) state that, "The goal of current ethics officers is that if they do their job then the need for them will go away when ethics is a part of day to day life in an organization" (p. 25). This is a wonderful goal and as a society it would be wonderful for ethics to be a part of daily life within our organizations, without any type of monitoring system. However, the current reality is that ethics means many different things to every employee and there are many temptations to not conduct business ethically. For now, it is safe to say that ethics officers are here to stay and their future will be a long one.

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COMPREHENSIVE QUESTION 2

Large-scale events are a rapid reemerging trend, from 1000 guest weddings to a 50,000-occupant employment fair. There are many important aspects to planning these types of events, including project management. What is the role of a project manager in large scale event planning? Evaluate the importance and effectiveness of a project manager in this type of event planning. Identify the key characteristics that a project manager would address in large event planning and analyze the cost to an event without project management.

Abstract

The paper discusses how the lack of project management in event planning could lead of many problems. This paper gives the backgrounds of event planning as well as project management. It details the processes of project management including extensive planning, leadership, developing scope and detailed documentation, identifying milestones and benchmarking. It explains in detail the tools of project management including the proposal, with a description of WBS and PERT charts. Tools also include systems, event risk management, contract management, and cost management. The paper gives the attributes of project managers including good organizational skills as well as communicational skills. Finally, the paper demonstrates the value of project managers by discussing their efficiency and explains effective project management can reduce costs, cycle times, and the risk of failures" (Bounds, 1998, p. 41).

Project Management with Event Planning

Imagine the work that it takes to plan a very large wedding. There is much excitement associated with planning the guest list, the venue, the first dance and so on. What if the wedding planner forgot to secure the location site? The wedding would have a date, time, participants, caterer, florist, but no location for the wedding to take place. This is an extreme example but one that would probably ruin the special day for the bride and groom. For this reason, it is extremely important for event planning in large-scale events to be very accurate and precise. Project managers deal with planning a large spectrum of projects and events and have a lot of experience with accuracy. The purpose of this paper is to show how a project manager can greatly improve the planning of large-scale events. This paper defines the role of a project manager in large scale event planning, as well as evaluates the importance of these types of skills to a large event. This paper also details the characteristics that a project manager uses in event planning as well as analyzes the cost to an event without a project manager. This paper shows how project management and the tools it provides can help make event planning more efficient as well as shows the importance of proper planning.

There is a stunning statistic that reports that “one quarter of all projects fail or are abandoned” (Engle, 2005, p. 20). Most of these projects “fail because management underestimates the amount of resources required, doesn’t organize the team properly, or neglects to staff the project adequately” (p. 20). This statistic alone reinforces the premise that projects must be planned properly. If one quarter of events fail because of lack of planning, this would cost the host of the event much time, money, and probably their reputations. “Lack of planning is a universal project killer, in fact, even in the accounting industry, lack of planning is the number one reason that implementations of software fail" (Boomer, 1998, p. 70). For these reasons it is extremely important that all of the details, or tasks, of an event are planned out accordingly.

Background of Event Planning

Events are defined as "temporary occurrences, either planned or unplanned" (Van Hoof, 1998, p. 206). Event planning is becoming a very big business that is not limited to weddings and parties. Many companies have downsized in the last decade and "independent planners have constituted the fastest-growing segment of the community of meeting planners" (Toh, DeKay, & Yates, 2005, p. 432). Extremely large companies, like Microsoft, have decided to outsource their meeting planners. These planners concentrate on the "content of meetings, such as themes and speakers, instead of the logistics" (p. 432).

Achilles (2002), who has nearly a decade of experience in organizing special events for clients in the hospitality, retail and health care industries, says that event planning professionals may have many jobs, such as, "role of event coordinator, caterer, floral designer, and media coordinator, to just name a few" (p. 11). Achilles reports that that you have to have a good checklist and check it daily. Achilles says on that list there are some things that you must have. The key components on that list are a budget, which impacts everything, a date and place, making all the considerations needed such as seating, parking, and time of year, and an invitation list along with dates on when to mail invitations, and secure event services such as florist, caterer, etc. Achilles also says the agenda is a key component, along with who will emcee and speak at the event, and "Will there be a presentation" (p. 11)? The next suggestion for the list is to record who will staff the event including the greeter, photographer, and speakers. The last suggestion is to debrief after the event to talk with the team about what worked and what didn't for the next event.

Elizabeth Allen (2005) also has an event planning business. Allen says that there are a couple of key things that she does to make sure her events are planned and run well. The first thing that Allen says to remember is that each event is a team effort and her trick is to make sure the event runs smoothly with little difficulty. She does this by choosing her team carefully and making sure she takes care of her team. Allen says that her job is to make sure the team leaders have everything they need to plan the event including no disruptions, such as a vendor that creates havoc. She knows that one florist is really good but also very hard to work with so she will not work with him at all even if it means not being able to plan a certain event. She says the disruption the florist causes is not worth it. Allen says the next key is trust. Allen says you must "trust that [your employees] are going to perform not only to your expectations but to their highest levels" (p. 47). Allen also really believes in empowerment and communication. Allen says, "When you want people to produce at their peak levels, empowerment and communication are vital" (p. 47).

Achilles and Allen give two good examples of businesses that are successful in the ways that they are run but would benefit from project management and the tools that it provides. Project management could help both Achilles and Allen to plan their events and programs more efficiently by improving Achilles' way of running her checklist and removing some the responsibilities from Allen.

Background of Project Management

Project management can be defined as the "application of knowledge, skills, tools, and human resources to organize, control, and deliver a project on time, within budget, while meeting stakeholder expectations" (Williams, 2005, p. 41). Another definition of project management is "the process, by which a project is initiated, planned, executed, and controlled from a clearly specified scope to successfully meet project objectives" (Beddia, Bertrand, Dion, Brown, Palado, & Rolfe, 2000, p. 94).

April Dmytrenko (1996) says "project management has been going on since Fred Flintstone outlined his project plan to Mr. Slate, of Slate Rock & Gravel Company, for converting to a TyrannosaurusExcavator" (p. 74). The history of project management probably goes back to the beginning of time, although the term "project management" has gained significance in the last century (Meredith, 2000).

In the recent years, project management has also spread from the product sector to the services sector. Project management is now used to plan everything from "teas, wedding, scout-o-ramas, fund drives, election campaigns, global mergers, parties, and recitals" (p. 9). Most types of projects use some form of project management whether it is called project management or not. In fact, project management has been used to develop everything from shoes to ships (p. 9). "The primary reason project management has recently become such an important practice is due to business competition becoming time-based, as well as cost-based" (Dmytrenko, 1996, p. 74).

Project management is also becoming mainstream. "Project management is being used by a wide range of disciplines and corporations that had never previously considered it as a viable method for performing work. Legal offices, hospitals, and other services, as well as traditional manufacturing firms, have become enthusiastic about the ways in which project management is improving their delivery of services or creation of new products" (Pinto, & Kharbanda , 1996, p. 45). Today "project management is an $850 million industry and is expected to grow by as much as 20 percent per year" (Bounds, 1998, p. 41). Lowe's, a major retailer of home improvement products and tools, has recently started a commercial ad campaign that advertises it will provide free project management software to customers redesigning their kitchens. This is a good example of how even consumers are starting to understand and realize the benefits and importance of project management.

Project Management Processes

Successful project management is not easy. "Project management requires deliberate planning and action to create the conditions for success and put in place the strategy, leadership, goals, process, skills, systems, issue resolution, and structure to direct and exploit the dynamic nature of project work" (Longman & Mullins, 2004, p. 60). Longman and Mullins say that work is done in this age through projects, and project management insures that companies that use project management are able to "meet, head-on, whatever strategic and operational challenges may come its way" (p. 60).

There are many project management processes to complete a project. The first step in project management is to determine who the project manager will be (Williams, 2005). The project manager oversees the entire project and communicates with the stakeholders and project team and is responsible for making sure the tasks are completed on time. This person is chosen because of their skill set and their team skills. This is an extremely important step. "Many project failures can be attributed to the selection of the wrong man as a project manager. The manager must be a leader, an organizer, and a planner" (Avots, 1970, p. 38).

Next, Williams (2005) reports the scope is defined. "The scope defines what will be delivered at the end project as well as what will be included in the project" (p. 43). Avots (1970) cautions that, "Project definition[s] should not be restricted to large and complex jobs. Significant new areas are often identified in planning small projects" (p. 39). The scope also defines the deliverables and expectations. It is very important to document agreed-upon deliverables, dates, and resources. Scope includes conducting reviews of the project status and any requests for changes are explored. A very important step in completing the scope stage of a project is defining project documentation. Project documentation can include the use of a change control forms and "requires that the details of the request be defined in writing, [then] reviewed, and [finally] approved before the project team commits any resources" (Williams, 2005, p. 44). "Documentation can include defining stakeholders, the project manager, deliverables, due dates, risks, change control forms, human and technical resources that are required, lessons learned, and an executive summary of the project" (p. 46). Next, scope determines milestones, risks, and other pertinent issues. "Milestones are significant deliverables that occur during the project. Risks and issues are potential flags or findings that may negatively impact the delivery of the project" (p. 44). All of these milestones, risks, and other issues should be documented. After milestones are completed, the team should recognize them so that everyone cleary understands what they are. Man-hours should also be tracked.

Williams reports that the next process in project management is benchmarking. Benchmarking in project management is called process benchmarking. Process benchmarking is "finding out how things are done" (Johnson and Gustafsson, 2000, p. 23). Project managers should find out how other project managers are doing things and what works well for them. Williams says the important thing to remember about benchmarking is that it can be copied from other industries. Questions to think about in benchmarking are, "How did they do it? What tools did they use? How did they create their project team? What were their lessons learned" (p. 47)? The lessons learned section of the project could serve as lessons and reminders for future projects. These are the steps that a project manager would follow when planning a project. An event planner would probably ask himself or herself if all of these steps were really appropriate for event planning. Next, a discussion will uncover the processes that are very much appropriate for event planning and why.

Appropriate PM process for Event Planning

Many of the project management processes that are very appropriate for use in event planning include extensive planning, leadership, developing scope and detailed documentation, identifying milestones and benchmarking. These processes are appropriate because events must be planned very thoroughly as well as efficiently in order for the event to be the best it can possibly be. Good leadership is important to any type of team but in regards to an event planning team, leadership could be the difference between a good event and a great event. Developing scope and detailed documentation are appropriate in event planning for accuracy in the resources needed as well as the cost estimations. Identifying milestones and benchmarking help to keep the event plan on track as well as to provide learning from other or past events. The role of a project manager in event planning can get confused with the actual processes of project management. The project manager has defined roles when planning a project and these roles will be discussed next.

Role of Project Manager in Event Planning

The role of a project manager in event planning is to lead the planning of the event. In leading the planning of the event, common sense provides that the project manager first consults with the client to find out the exact needs for the event. The project manager then develops the plan of the project including each specific task and the total cost to complete the project (Meredith, 2000). Next the project manager assigns the tasks to the resources and creates the timeline. Finally the project manager makes sure the “proper facilities are available” (p. 118).

The project manager uses many tools in planning the event. Many of these tools make the planning of the project much more detailed as well as effective.

Tools

The main project management tools that will be discussed in this paper have been narrowed down to the five that the researcher feels are the most important. The tools discussed will be the event proposal, possible systems that would be used, event risk management, contract management, and cost management. The event planner, when planning a project, would most likely use some form of some of these tools but probably not to the extent that an experienced project manager would use them and likely the tools would not be defined as clearly. A project manager also has some attributes that are very important for project success that will also be discussed.

Proposal. The first project management tool that would be helpful in event planning is the project proposal. Most event planners have to compete against other event planners for the business. It is very important that the event planner gives the client a proposal of the event plan including milestones, schedules, and budgets not only to show the client how well thought out the event is, but also for the event planner to get a good estimate of the cost of the event. It is the tendency for project managers to not want to do a proposal for projects that are not very technical. They feel this is a step not needed when projects are smaller. However, it is very important to do a proposal for each and every project (Meredith, 2000).

Meredith (2000) explains that there are five parts to the proposal. The first is the cover letter, giving the title of the proposal, next is the executive summary. The executive summary gives an outline of the project and the benefits that will be achieved by the project. The next part of the proposal is the implementation plan. The implementation plan “contains estimates of the time required, the cost, and the materials used. Each major subsection of the project is listed along with the estimates of its cost" (Mereidith, p. 70). The implementation plan can also include charts such as the Program Evaluation and Review Technique (PERT), or a work breakdown structure (WBS).

PERT and WBS are extremely effective tools for project managers and used often. Therefore, each of them will be discussed in more detail. PERT uses the event-on-node technique in which "events are represented by boxes (or nodes) connected by arrows to show the sequence in which the events are to occur" (PMBOK, 2000, p. 201). These boxes or nodes provide a "graphic[al] illustration" (Kazan, 2005, p. 295) of the project. "PERT is a network based technique for analyzing a system in terms of activities and events that must be completed in a specified sequence to achieve a goal" (p. 294). "A PERT chart is a project management tool used to schedule, organize, and coordinate tasks within a project. Creating the PERT chart is pretty easy. The project manager would first, "set the project start date, completion dates, [then create the] project methodology life, [next] determine the scope, identify milestones, [and] list tasks by each phase" (p. 295). Next, the project manager would establish personnel necessary and available, determine skill level necessary, task dependencies, and project control or review points. Finally, project cost estimates and cost benefit analysis would be performed (p. 295). "The methodology for using PERT is project definition; resource planning, project scheduling, and project control. PERT helps managers estimate the beginning and finish time in strategic decisions, helps to compute costs relating with every activities, helps identify dependencies, estimate the longest time relating with activities, gives the deviations relating with the activities, determines the critical activities, determines probability relating the project in strategic decisions" (p. 300). The alternative to the PERT chart would be the WBS chart.

"The WBS approach to estimating a project can be a solid management practice – under certain circumstances. Problems arise when [project managers] don't know what the tasks are because this project is new" (Armour, 2006, p. 18). New tasks can be the hardest to estimate. "WBS relies on projecting a value that represents the "size" of the system [or project], and then uses a formula to convert this to the key outputs of a project estimate: the likely duration, effort/cost, and staffing needed to create a system [or project] of that size" (p. 20). Both PERT and WBS are good tools to consider when planning a large-scale event. Many tasks in a large event will depend upon other tasks being completed. Such as, when planning a wedding, you may not be able to choose a caterer until the venue is selected because some venues will not allow outside caterers. PERT and WBS can help identify those contingencies.

The implementation plan would also include a contingency plan. A contingency plan "identifies alternative strategies to be used to ensure project success if specified risks occur" (PMBOK, 2000, p. 199). A contingency plan takes just a couple of extra steps and could end up saving a project. The next part of the proposal is the plan for logistics support. This part gives a description of the suppliers for the project. It may seem like a lot of work to do for just the proposal but "attention to detail in all aspects of the project planning increases the probability of success for the project-and impress the potential [client]" (Meredith, 2000, p. 70). Something else to consider for the logistics part of the proposal is change-orders. Even small changes can cause large problems. It is important to set the ground rules on how changes should be handled from the start to avoid future confusion and problems.

The last part of the proposal is the past experience section. This section is a good place for the event planner to sell themselves. The event planner should give examples of past events planned or technical qualifications that could assist in the event planning. Their project management skills should be highlighted at this point as well. Longman & Mullins (2004) say, "Superior project management skills can be an important competitive differentiator" (p. 60). These skills could help the event planner win the contract. The next tool that project managers often use is computer software or systems that assist in the planning process.

Systems. The system, or computer program, that the project manager chooses to use can make all the difference in the world to the planning of the project. "A flexible system lets you quickly set up and test new events, flexible systems also let you measure the results of different project variables, such as costs or limited resources" (Studt, 1994, p. 45). Welcom Software Technology has project management software available called Texim Project for Windows. "This software allows the work breakdown structure (WBS) and the organization breakdown structure (OBS) to work together and mirror changes made in one of the systems to the other" (p. 45). This gives the capability of not missing activities and resources needed for the project. The project management software, or project management system, needed for event planning does not have to be extremely complex. For instance, the software needed for a large construction project would need to be much more involved then the software needed for an intimate benefit party. However large or small the project, the software should include certain items such as "graphical data entry, spreadsheets, dialogs, clipboards, and import facilities" (p. 45). Texim software does include these items and is a low cost option for event planners. This software is also easy to learn. Another thing to consider is most programs, of any type of software, come out with upgrades. This is part of staying competitive in the software market. Often times however, "new features build in complexity that eliminates the intuitive feel that made the program good in the first place. Soon you have a program with millions of lines of code and a manual for a doorstop" (Castelluccio, 2005, p. 53). The Texim software is not the newest, greatest, feature packed software that is available, however it feels comfortable for event planning and that, indeed, makes it good software for project management in event planning.

Event risk management. The next tool that project managers would use in event planning is risk management. Dorrit Turner who owns and runs Yellow Rose, an event planning company, says “Risk management is planning ahead, identifying and anticipating exposures, thinking about how we can protect our clients, employees, the company and its reputation” (Schroeder, 1999, p. 83). The Project Management Institute’s Risk Management Guide (1992) defines risk management as “the art and science of identifying, analyzing, and responding to risk factors throughout the life of a project and in the best interests of its objectives” (p. 11-3).

The first step in the risk management process is to discover what the risk is and then take actions to avoid the risk (Schmidt, Lyytinen, Keil, Cule, 2001, p. 6). Schmidt et al. explains the problem is that there is no magic list of risks and often the project manager doesn’t always understand the nature of the risks. There are two thoughts on the steps involved with risk management. Schmidt et al. also believes that risk management should be a two-step process. The Project Management Institute (PMI) believes there is a four-step process to risk management. Schmidt et al.’s first step is identifying the risk and the next step is taking actions to control it. Although identifying the risk, or risk assessment, “consists of three steps: identification of risk factors, estimation of the likelihood for each risk factor to occur, along with potential damage from the risk, and an evaluation of total risk exposure” (p. 8).

In comparison to Schmidt et al.’s belief of the two-step process, the PMI believes in the four-step process. The institute reports that the first step is identification, then assessment, next is response, and finally documentation. After following these steps, control of the risk will be much easier. Because of unforeseen costs, or risks, and limited information and project scope, a "risk reserve, or buffer, should be estimated (Karlsen, 2005, p. 24). This risk reserve consists of "contingency, allowance, and budget reserve" (p. 24). Karlsen reports that risk reserve and proper cost estimation give a big advantage in competitive markets. Calculating accurate cost estimates and completion times is also a major part of risk management. Two types of techniques that can assist in these estimates are, the PERT and Gantt charts. PERT and Gantt show the critical paths of tasks to be completed and therefore are a valuable part of the risk management plan. For event planning it really doesn't matter what process is chosen to use in risk management as long as it is performed accurately.

Contract management. Contract management is a very important part of event planning. With large events there will undoubtedly be many different vendors, or providers, therefore creating the need for very accurate and specific contracts. "A contract is a mutually binding agreement that obligates the seller to provide the specified product and obligates the buyer to pay for it" (PMBOK, p. 199).

The Project Management Institute's Guide to Project Management Body of Knowledge (PMBOK) (2004) says there are generally three types of contracts. The first is the fixed price contract. This contract has a fixed price for a product (or service) that is very clearly defined. The next is cost-reimbursement contracts in which the contractor, or event planner, would be reimbursed for their actual costs, such as direct and indirect costs. The last type of contract, defined by PMBOK, is a time and materials contract with which the full value of time and materials is reimbursed when both the buyer and seller agree upon the rates. In event planning the event planner will probably have a cost-reimbursement contract with the client to assist in simplicity and a fixed price contract with the vendors to avoid unforeseen costs. Cost management is a very significant tool in event planning and is discussed next.

Cost management. The PMBOK says that there are four parts to cost management. They are resource planning, cost estimating, cost budgeting, and cost control (p. 83). Resource planning is what resources are needed in the project and how much of each resource is needed. Cost estimating is developing an estimate of all of the costs in the project. Cost budgeting is allocating the costs to each task in the project. Finally, cost control is controlling costs when changes to the project happen. All of these parts of cost management interact with each other and each should be planned out before each event to ensure the cost estimate is accurate.

Attributes of a Project Manager

As demonstrated with the previous information, project managers use many tools that can be very effective in event planning. In addition, a project manager usually possesses certain attributes that are very important when planning a large event. Longman and Mullins report that some people are just not right for “the challenges of project management” (p. 58). Longman and Mullins say that some people do not like the environment of project management and do not have the right attributes to be successful, but others thrive in it. The people that usually thrive in project management, “love the challenge of working toward a goal and being part of a project team; they love the unique challenge that each project brings” (p. 58).

The first attribute a good project manager would possess is good organizational skills. They have responsibilities to many different areas including their parent company, the project and the client, and the team (Meredith, 2000). The project manager must be able to organize each area and the responsibilities that they have to that area. Good organizational skills are a key in large event planning as well. Project managers usually have great organizational skills as well as the right tools to assist in the planning. Project managers tend to plan in sections or parts of projects after defining the end result. They use a bottom-up strategy for planning in which they define the end result, and then collect all the information, vendors, buyers, man-hours, costs, and so on, to end up with the final product. This type of planning gives great attention to detail and therefore mistakes are less likely. Another attribute a good project manager would have is good communication skills. It is the project managers job to keep everyone concerned with the project updated to the status of the project (Meredith, 2000). They must communicate with upper management as well us lower level personnel and the project team with progress reports. They need to know how to communicate with each type of personnel level, for example a report to a upper management employee would be much less in-depth then a lower level employee that needs to know many details (p. 517). These skills are extremely important to every type of manager when dealing with anyone, be it customers or employees.

Demonstrating Value

There are some key characteristics that a project manager would address when planning large-scale events. One of the most important of these is demonstrating value through measurement and analysis. Given that, “effective project management can reduce costs, cycle times, and the risk of failures” (Bounds, 1998, p. 41), the value of project management can still be hard to demonstrate because it is difficult to realize the benefits. Rob Loader (2005) for the Australasian Business Intelligence says, “benefits have to be identified and quantified. There has to be a clear plan to realize the benefits” (¶ 1).

Project success is one of these benefits. Kiser and Winder (2004) say that success is sometimes achieved with employees that have good project management skills. They say, “Supply managers who embrace the project management process will be more successful in directing key projects and delivering results that top management demands. And one of the essential ingredients to this success is the development of an effective project team” (p. 7).

Good communication skills are the next benefit. Good communication is important in most industries. In project management however, it can be the difference between project success and project failure. Project managers must have good communication skills in order to understand the project needed and in order to plan the project appropriately. Event planners using project management usually have good communicational skills to understand fully the expectations, in order to provide value, to the host of the event.

“Many companies calculate value when they rush from one task to another without a grasp of how all the tasks fit together” (Leemann, 2002, p. 11). “Project Management can add value by anticipating and proactively addressing the issues attending regulatory difficulties” (Beddia et al., 2000, p. 94). Project managers can address these issues by using “standard formulas such as cost benefit analysis (CBA) or return on investment (ROI)” (Simon, 2003, p. 59). Project managers must also provide a value, but when event planning, that value could mean different things to different people. Furthermore, a study conducted by PM Solutions' Center for Business Practices found “effective project management programs yield an average 28% return on investment and overall business improvements by an average of 21%. “The most significant improvements were shown in schedule estimation, 42.1%, and alignment to strategic business goals, 41%” (Anonymous, 2002, p. 3).

Efficiency is the next benefit of project management. Leemann says project management’s “most fundamental tool is the work breakdown structure (WBS), which breaks a complex, daunting project into levels of manageable components and tasks. Its goals are to focus and allocate resources more efficiently” (p. 11). Leemann adds that, “managing projects using a WBS reduces the chaos people tend to experience” (p. 94-95). Beddia et al. continues to say, "For a large corporation, missing the mark may damage a career, whereas a start-up firm may meet its demise" (p. 94).

Event Planning without Project Management.

Event planning without project management can be done successfully; however using project management techniques will insure attention to detail and help avoid mistakes. The odds of success for a project greatly increase when using the project management tools. For example, a non-project manager event planner would probably not include a PERT or WBS chart in their proposal. Therefore the timeline of the project, individual task, and the critical path would not be estimated as accurately as when done with PERT or WBS charts. In addition, the planner would probably not use project management software therefore finding the critical paths for the project would be more difficult and major tasks could be missed. Inadequate event risk management and contract management could possibly ruin the entire event. Also, cost management is taken very seriously by project managers and is calculated by tedious processes. A non-project manager event planner could miss some of the small costs that add up. A project manager is more likely to include these costs because of the WBS that is included in their proposal. Project managers also possess a "proactive, planning-based approach to risk assessment" (Gannon, 1994, p. 7). This helps them to identify and minimize the possibility of risks to a project. A good event planner probably possesses many of the attributes that a good project manager would have, such as communication and organizational skills however project management just adds an extra insurance of a project's success.

Discussion

Project managers are everywhere in every industry. The reason there are so many is because their skills are invaluable when planning any type of project, including event planning.

This paper has determined that the role of a project manager in large scale event planning is very important due to the skills that the project manager possesses. These skills have been identified as “strategy, leadership, goals, processes, systems, issue resolution, and structure to direct and exploit the dynamic nature of project work” (Longman & Mullins, p. 60). The effectiveness of delivering results has been shown with the tools that a project manager uses when planning a project. These tools have been identified and explained as the proposal, computer systems, risk management, contract management, and cost management. The processes have been given and include extensive planning, leadership, developing scope and detailed documentation, identifying milestones and benchmarking. Most importantly the value of project management to event planning has been demonstrated by showing how it can reduce costs as well as project failures, give up to a 28% ROI, improve schedule estimation by 42.1%, and promote project efficiency.

In summary, the cost to a project without a project manager could mean a project failure. Pinto and Kharbanda (1996) say, “there are lessons to be learned from failure, if only we are willing to draw them” (p. 54). The American Heritage Dictionary (2000) defines failure as “The condition or fact of being insufficient or falling short”. Failure is often not tolerated and in the event planning business, failure is not an option. Project managers can be the difference in a large-scale event between failure and a success and that truly is a worthy reason of using project management in every single event planned.

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