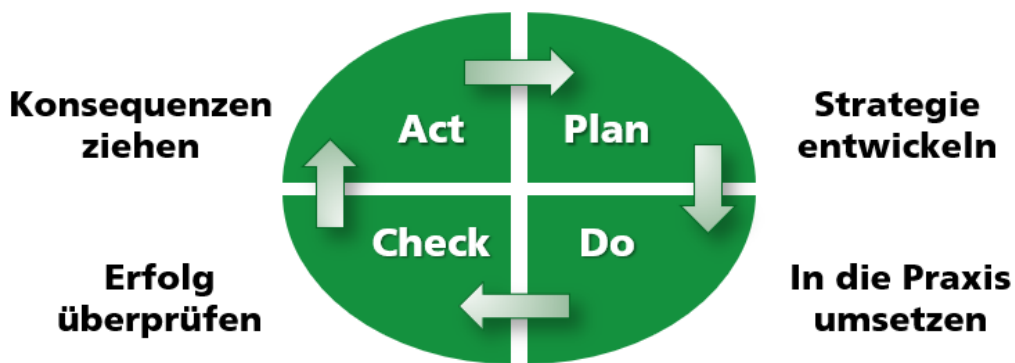




Sustainable events? Absolutely.

The phase "planning a sustainable event" is followed by implementation. In addition to the internal organisation and establishment of operational and management rules explained in Part III, a documentation system is an absolute must. In the fourth part of our publication series, we talk about what and why should be documented in a sustainable event management system.

As always at the beginning, we turn to the PDCA cycle:



What is behind the "Do" phase?

The operational implementation of a sustainable event involves many aspects. The most important ones are the following:

- ▶ There is a team that has the competence and resources to implement the project (Part III)
- ▶ There is a sequence of operational steps that were established during planning and are now being exercised so that the objectives can be met (Part III)
- ▶ **Documentation was created that records specifications and evidence**

Management documentation

ISO standards generally impose certain requirements on operational and management-relevant documentation. ISO 20121 is no exception. In addition to the values and guidelines of the operation, a whole series of rules, processes and results must be documented.

However, this is by no means a "paper battle", but rather the establishment of an efficient "operating system" with corresponding regulations and fixed results. It should always be kept in mind that documentation is a **manifestation of lived practice**. Over time, experience shows that it will become more and more customised and efficient. Every year, it should be checked whether the documentation can be optimised, made more precise and readjusted. The motto of management systems, "Always improving", fits wonderfully here.



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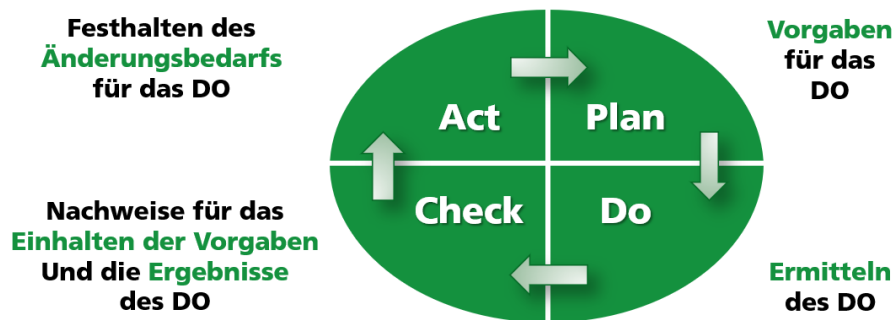
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Why so much documentation? Sense and purpose of documentation

The documentation serves to make elementary procedures, facts and evidence available to everyone in a transparent and comprehensible way:

- ▶ "TARGET VALUE" that employees are expected to follow (very helpful when training new employees).
- ▶ Recording the results of the services: "ACTUAL VALUE"
- ▶ Analysis of whether the corresponding activity is actually carried out as originally specified: Comparison "target vs. actual"
- ▶ Evaluate the learning effects that become apparent during application in practice and should definitely be included in the next target definition = new TARGET VALUE



What form of documentation is required at all?

Not unlike the other ISO standards for management systems (MS), ISO 20121 does not give any concrete guidelines on how organisations should organise their management documentation. The type and form of documentation is at the discretion of the user. Above all, it must be helpful for the company's system of values and goals. It makes most sense to integrate it into the existing structure in order to increase acceptance on the part of employees.

Manuals (almost) always help

From many years of auditing experience, however, we recommend that the management documentation be written in the form of a manual in which the standard requirements are implemented through the company's own management regulations - each chapter of the standard is assigned to the corresponding chapter of the manual.

It is advisable to keep the regulations short, concise and rather general. Templates (forms, protocols, checklists) should be assigned to each chapter as applicable documents and linked accordingly if necessary.

This system is used in most MS and has proven to be the most efficient way for all parties involved: The comparison of requirements with their implementation is much quicker this way, which significantly reduces the effort for all parties in a certification process.

Once the system is "on a firm footing" and has been checked and approved several times by auditors, it can be located in the corporate structure and grow or adapt dynamically.



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Brevity is the spice of life

Another recommendation is the content of the company's internal management regulations: A common mistake during system implementation is that the manual mixes general management regulations and the description of a current state at the time of certification. This combination not only makes the manual far too comprehensive and intransparent, **it also does not meet the requirements.**

The description of the ACTUAL situation is presented each year through the completed templates for the individual chapters. The evidence can gladly be compiled in the annual report of those responsible for the evaluation of the top management in the context of the management review. However, they should not be part of the manual: The manual only sets out the SHOULD state.

WHAT must be documented?

ISO 20121 specifies different regulations for documentation, depending on the type of certification. The main issue is whether a single event, a series of events or the management system as a whole - the so-called "system deployment" (ALL events + own operation) - should be certified as sustainably oriented. Read more about this in the description of our [audit procedure for sustainable events](#).

- ▶ The following information must be documented for **individual events** (the respective standard chapters are in brackets):
 - ▶ Werte (4.5)
 - ▶ Leitlinien (5.2)
 - ▶ Kontext:
 - ▶ Liste der Stakeholder (4.1)
 - ▶ Ergebnis der Stakeholderanalyse (4.2/ 5.2.2)
 - ▶ Liste der gesetzlichen und anderen Verpflichtungen in Bezug auf die VA (6.1.3)
 - ▶ Ergebnisse zur Bestimmung von Handlungsfeldern (6.1.2/ 5.2.2) inkl. Liste der Risiken & Chancen (6.1.1)
 - ▶ Planung:
 - ▶ Ziele (6.2) mit der Methodik zur Leistungsbewertung (9.2)
 - ▶ Maßnahmen zum Zielerreichen (6.2)
 - ▶ Umsetzung:
 - ▶ ausgefüllte Vorlagen, die nachweisen, dass NAKriterien in die Geschäftsprozesse für jede Art der Tätigkeit eingebracht wurden
 - ▶ Kontrolle:
 - ▶ Aufzeichnungen zur internen Kontrolle vor, während und nach der VA
 - ▶ Auswertung:
 - ▶ Protokoll der Managementbewertung (9.4) im Nachgang der VA
 - ▶ Verbesserung
 - ▶ Einpflegen von Lessons Learned für die künftige VA bspw. in KMP (10.1)
- ▶ In the **system approach**, the following information must be documented (the respective standard chapters are in brackets):
 - ▶ Werte (4.5)
 - ▶ Leitlinien (5.2)
 - ▶ Kontextanalyse
 - ▶ Liste der Stakeholder (4.1)
 - ▶ Ergebnis der Stakeholderanalyse (4.2/ 5.2.2)
 - ▶ Liste der gesetzlichen und anderen Verpflichtungen & Verfahren zum Umgang mit denen (6.1.3)
 - ▶ Risiken & Chancen Analyse (6.1.1)
 - ▶ Verfahren zur und Ergebnisse der Bestimmung von Handlungsfeldern (6.1.2/ 5.2.2)
 - ▶ Anwendungsbereich (4.3)
 - ▶ Organisation innerhalb der Wertschöpfungskette (5.2.2)
 - ▶ Planung:
 - ▶ Ziele (6.2)
 - ▶ Maßnahmen zum Zielerreichen (6.2)
 - ▶ Darstellung der Prozesse (4.4, 8.1)
 - ▶ Unterstützung
 - ▶ Organigramm/ Bestellung Beauftragten (5.3)
 - ▶ Schulungsplan und Kompetenznachweise (7.2)
 - ▶ Verfahren interne/ externe Kommunikation (7.4)
 - ▶ Lenkung der Dokumentation (7.5.3)
 - ▶ Kontrolle:
 - ▶ Auditprogramm, Bericht als Nachweis der Ergebnisse (9.3)
 - ▶ Verfahren zur und Nachweise der Leistungsbewertung (9.2)
 - ▶ Auswertung
 - ▶ Verfahren und Ergebnis der Managementbewertung (9.4)
 - ▶ Verfahren zum Umgang mit den Nicht-Konformitäten und Korrekturmaßnahmenplan - KMP (10.1)



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Conclusion

Documentation plays a very important role in orienting events towards sustainability. It provides target values and transfers the requirements into the lived business processes. The documents provide guidance on how activities relevant to sustainability performance should be carried out and provide evidence of how they have already been implemented.

If sustainability management is not limited to a single event, experience brings efficiency and customised solutions to documentation requirements as well. As the system matures, the efficiency and practicability of internal documentation also increases.

Your auditors check the documents to determine that the requirements of the standard are met. The added value of external certification is to help the users by providing an outsider's view with recommendations and hints in the audit to make the documentation suitable for the company.

In the next part of the publication series, we will go into the last step "CHECK" and determine whether the results achieved also meet the previous expectations. If you can't or don't want to wait for the publications of the series, you are welcome to attend our [seminar](#) on sustainable event management.

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