

# Events Management

a practical guide



A reference for event planning  
and production in Scotland

EventScotland™

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Events Management: a practical guide

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The logo for EventScotland, featuring the text "EventScotland" in white on a blue rectangular background. A small "TM" trademark symbol is positioned to the upper right of the word "Scotland".

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**welcome to**  
**events management:**  
**a practical guide**

A white rectangular badge with a pink border, attached to a blue lanyard with a silver metal clasp. The badge features the text "event management" in a bold, black, sans-serif font, with "event" on the top line and "management" on the line below. Below this, the text "AAA" is printed in a very large, bold, black, sans-serif font. Underneath "AAA", the words "access" and "all areas" are printed in a bold, black, sans-serif font, stacked on two lines.

**event**  
management

**AAA**  
access  
all areas

## Foreword

This guide has been published by EventScotland to provide a resource of general advice and support material for event managers. Primarily, it has been designed as a support tool for our Regional Events Programme, but it may also be of use or interest to the wider events sector. The aim is to assist effective event management through the provision of a step-by-step guide to the planning process, together with sample checklists and adaptable templates.

EventScotland supports a wide range of cultural and sporting events across the country and whilst the delivery mechanism for each event is different, there are broad key areas common to the management of the majority of events. The task of providing general advice and guidance to address this diverse sector was certainly a challenge. Our two co-authors have extensive professional events management and marketing experience. The content of this publication is based on their personal experiences, best practice learned 'in the field' and as a response to working with Regional Events Programme applicants. It does not attempt to provide sector specific advice, nor does it present itself as the last word in events management.

We hope you find it useful.

**David Williams**

Chief Executive, EventScotland

## About the Authors

Co-authors Marie Christie and Lesley McAteer have many years of experience in the Scottish Events Industry. They have worked together in the creation and delivery of a wide range of successful events and festivals. Meeting in 1997 whilst at UZ Events, one of Scotland's leading events companies, their portfolio includes the Glasgow Art Fair (00–04), Big in Falkirk, Scotland's National Street Arts Festival (00–03), Glasgow's Hogmanay (96–99), BBC Music Live (99), On the Streets: City of Design 1999, the Grand Opening of the Forth & Clyde Canal (01) and Glasgow on Ice (00).

### Marie Christie

is currently EventScotland's Regional Events Programme Manager. Since the creation of the role in early 2004, Marie has worked with events and festivals all over the country to help them achieve their development potential. With around 50 events supported each year, Marie has co-written this guide as a tool to support the delivery of the Programme. Prior to joining EventScotland Marie was General Manager and Producer at UZ Events. Supplementing her wide ranging events management expertise, Marie also has a background in arts marketing and has promoted theatre productions all over Scotland.

### Lesley McAteer

is an events producer with extensive experience of creating and managing large-scale outdoor events, many of which are driven by tourism and economic development objectives. Having started her career in the entertainment industry in 1992, Lesley undertook various roles in the areas of music promotions, business management, college lecturing (business and media), event programming and event management. Her appointment as Producer of Glasgow's Hogmanay 1997 marked a new direction in producing large-scale events. Lesley has co-written this guide as a means of passing on her knowledge to assist the many exciting and inspiring events and festivals taking place in Scotland. Recently, Lesley became a partner in McAteer Photograph – an established and successful locations and events photography company.

# Introduction

## Why this guide has been produced

This guide has been produced to assist with the effective management of events across Scotland. Primarily it has been designed as a support tool for EventScotland's Regional Events Programme. Taking on board the experience of running the Programme, the aim was to provide reference material, templates, checklists and 'best practice' advice on a range of key topics common to the delivery of a wide range of cultural and sporting events. The contents are not fully comprehensive nor are they sector specific and it is expected that the reader will adapt the advice and customise the guides and templates to their particular situation.

## Who the guide is aimed at

Although this guide has been designed as a support tool for the Regional Events Programme, it is hoped that its contents will be of use to the wider events sector, in particular event managers who are:

- ▶ New or experienced
- ▶ Running medium to large scale cultural or sporting events
- ▶ Keen to develop their events further

## How to use this guide

This publication is extensive. To help with its navigation each chapter is colour coded and a summary of each chapter's content is given in the 'Quick Find' guide on page vi. This guide should be read in conjunction with any locally-focused event management guides/toolkits offered by your local authority and/or any appropriate sector specific publications.

## Distribution

Applicants to the Regional Events Programme are eligible to receive a free copy of this guide (whilst stocks last). This publication is also available to download from [www.eventscotland.org](http://www.eventscotland.org)



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## Quick Find

To help you navigate through this guide, an overview of each chapter's content is provided below. Use the colour coded tabs to locate the chapter you require. Where templates are provided, the following symbol (T) is shown.

### Chapter 1 Where to Start – General Planning (T)

Page 1

Contains guidance on: 1) the event concept; 2) defining and communicating the event's vision and mission; 3) setting SMART objectives; 4) the SWOT analysis; 5) deciding on event dates and venues; and 6) the 'Event Action Plan'.

### Chapter 2 Business Planning (T)

Page 21

Contains an overview on the purpose and usefulness of business planning together with a template/guide to help event managers formulate their own business plans.

### Chapter 3 Putting the Team Together

Page 31

Includes an overview of the types of organisations that run events; an outline of key roles and responsibilities to consider; recruitment issues, legal obligations and some comments regarding the 'wider team'.

### Chapter 4 Budgets and Financial Management (T)

Page 41

Includes guidance/templates to assist with: preparing event budgets, control mechanisms, petty cash, cash flow projections, tips for managing finances 'on site'; other financial issues (annual accounts, VAT, gift aid, record of assets); future planning.

### Chapter 5 Making It Add Up – Fundraising (T)

Page 57

Includes: advice on potential income sources (e.g. ticket sales, participant entry fees, public funds, commercial sponsorship, trusts and foundations, concessions & franchises, merchandising, showcase & demonstration, advertising, in-kind support, etc); revenue plan template/guidance; advice on raising commercial sponsorship including a sponsorship proposal guide/template; tips to help you manage the relationship with your sponsor; a step-by-step guide to the tendering process.

**Chapter 6 The Programme**

Page 81

Includes general points to consider when structuring your event programme.

**Chapter 7 Legal Issues**

Page 89

Includes advice and information regarding the organisational structure and legal status of events/event organisations, event ownership, contracts, licences and permissions, disability issues, equal opportunities, data protection and insurance.

**Chapter 8 Insurance**

Page 103

Includes general advice on how to approach event insurance, a checklist of the sort of information an insurer is likely to require, an outline of the sort of cover events are likely to require, advice on claims management.

**Chapter 9 Event Production: Operations, Equipment, Facilities, Health & Safety (T)**

Page 111

Includes advice designed to assist with the safe delivery of events: equipment and facilities checklists; an 11 point guide to assist with site/venue layout; advice on creating site/venue plans; the role of the safety officer, the H&S policy, the event safety memo, reporting procedures, normal operating procedures, monitoring and inspections, plans and drawings, method statements, communications, emergency services, medical provision, welfare services, traffic and transport management, security and stewarding, risk management & assessment.

**Chapter 10 Operational Communications**

Page 148

This chapter describes two operational communication tools: 1) the event manual and 2) the staff briefing document. Guides are provided to help you create your own versions.

**Chapter 11 Marketing and Communications (T)**

Page 159

This chapter aims to give those who are new to event marketing and communications (or those simply in need of some inspiration) a basic guide to help them through the planning process. Includes: 1) where to start, 2) who should devise the marketing plan, 3) resources, 4) identifying your target market, 5) forming the marketing objectives, 6) developing the marketing strategy, 7) marketing tools, 8) media relations, 9) a marketing plan template.

**Chapter 12 Visitor Research (T)**

Page 199

This chapter outlines the importance of understanding the event audience. A basic checklist and questionnaire template is given as a starting point for event organisers to design/commission their own research.

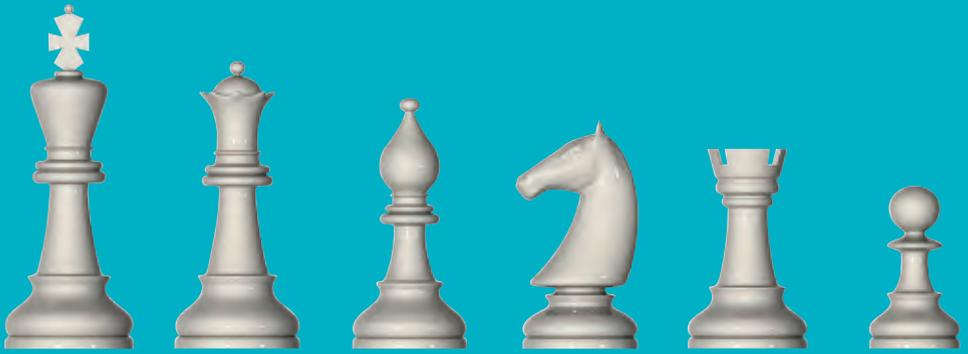
**Chapter 13 Post-Event**

Page 209

This chapter includes an overview of the post-event steps that should be taken.

**Appendix Useful Contacts and Resources**

Page 215



chapter one

# **where to start – general planning**



# The planning process is one of the most important aspects in successful Event Management: the more robust the plan, the smoother the journey to success.

Good planning is a continuous process and good plans should be adaptable and flexible – they require a solid foundation and a straightforward structure. This first section is a step-by-step guide, designed to help you get started in the initial stages of event planning.

**Areas covered in this section include: 1) the event concept; 2) defining and communicating the event's vision and mission; 3) setting objectives; 4) the SWOT analysis; 5) deciding on event dates and venues and; 6) the 'Event Action Plan'.**

We've suggested a range of exercises that you might undertake – the point is to get your plans on paper, look at the timeline available, the resources required and what needs to be achieved in order to deliver your event.

## 1) The Event Concept

Successful events are usually based on a strong concept and purpose. Ideas for holding events arise from a multitude of reasons. For example your idea may have come from a need or desire to:

- ▶ Celebrate a unique aspect associated with your town or area
- ▶ Showcase or develop a particular cultural or sporting activity
- ▶ Mark an historic occasion, national day or local holiday
- ▶ Host or create a competitive or mass participation sporting event
- ▶ Encourage more visitors to come and spend time (and money) in the town/area
- ▶ Improve or refocus the image of your town/area
- ▶ Encourage and celebrate community activity
- ▶ Mark an opening or launch
- ▶ Etc

Whatever the impetus for your event, you will have identified an opportunity and assessed the various broad risk factors associated with its successful delivery. You will have considered:

- ▶ If the event is unique or if it's duplicating an existing event
- ▶ If there is a gap in the market that the event can fill
- ▶ If there is a demand for such an event
- ▶ If the resources are available to deliver it
- ▶ If the community, the local authority and relevant sector body will support and 'buy into' the event
- ▶ If it will be financially viable
- ▶ If it will be sustainable in the longer term
- ▶ If it has potential for growth
- ▶ If there will be any legacy

## Always Review and Revise

If the event is staged on an annual or repeated basis, at the beginning of each year's planning process always make time to review the reasons that you are staging the event and to consider how it can be developed further. Don't make the mistake of just ploughing on expecting everything to come together in exactly the same way it did the previous year. Ask yourself:

### Why are you staging the event?

- ▶ Is the event still relevant?
- ▶ Have the vision, mission or objectives changed?
- ▶ Does it still have support from the event team, participants, audiences, community, local authority, funding bodies and sponsors, etc?

### How will the event be developed?

- ▶ Do you (still) have the right skills in place to develop and deliver the event?
- ▶ Can you build on previous successes?
- ▶ What areas could be developed further?
- ▶ How can interest be maintained?
- ▶ Is there potential to attract new audiences?

- ▶ Is the marketing working?
- ▶ How will you maintain or extend the financial viability of the event?
- ▶ Do you need to consolidate the event or focus on key elements?
- ▶ Do you need to widen the scope of the event?
- ▶ Has the event reached capacity?
- ▶ Has the event reached the end of its life cycle?

**With annual or repeated events you should be looking at ways to improve the event experience and impact year on year.**

## 2) Communicating the Vision and the Mission

If you don't already have an articulated vision and mission statement for your event, you may be unsure or confused as to what it actually means to have one. You may also be a bit sceptical about the need for such statements. Our advice is pretty straightforward in this respect: by defining the vision and the mission (or purpose) of the event at this stage, you will be able to more clearly communicate to others what you hope to achieve, thus providing focus and direction for everyone involved (including potential funders). **In essence, don't expect others to be able to read your mind.**

Your vision statement should be a short statement that describes, in broad terms, the event's long term aim. The mission statement sits underneath this and gives more detail about how the vision will be delivered. These are important positioning statements and they need to be both concise and achievable. To give you an example, here's EventScotland's vision and mission statement as stated in Scotland's Major Events Strategy 2003–2015:

### **Vision:**

To become one of the world's foremost events destinations by 2015.

### **Mission:**

To deliver a viable portfolio of events to attract visitors to Scotland, to enhance Scotland's international profile, to strengthen our sporting and cultural infrastructure and to maximise the economic, social and environmental benefits of events to all parts of the country.

Here's an example of what a vision and mission statement might look like for a visual arts festival in 'X-Town':

**Vision:**

To put X-Town's visual arts heritage and community on the Scottish cultural map.

**Mission:**

Stage an annual visual arts festival with a programme of quality events, exhibitions and community activities that showcase the work of local artists and engage with the wider visual arts scene in Scotland, whilst attracting visitors and media interest from outwith the region for the cultural, social and economic benefit of the artists and wider community.

### 3) Setting SMART Objectives

You should also be able to define and communicate your event's objectives. Your objectives should help deliver your vision and mission. Objectives need to be clearly set out and should follow the **SMART** principle: **S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-Based:

- ▶ **Specific:** Be specific about what is to be achieved. For instance, if an objective is to attract tourists to the event, be specific about where they will be coming from, how many you hope to attract, etc.
- ▶ **Measurable:** A system, method or procedure is required to allow the tracking and recording of the action upon which the objective is focused. For instance, a monitoring system should be put in place to record how many tourists came to the event, where they came from, etc. This could be done through visitor research and/or ticket data capture for example.
- ▶ **Achievable:** The objectives that are set need to be capable of being reached – never overstate your objectives. If targets are unrealistic, all you will be doing is setting yourself up for a fall. For instance, don't set the target of attracting 1,000 tourists from North America when you only have a short period of time to market an event that, realistically, will only achieve 500 day-trippers from neighbouring regions.

- ▶ **Relevant:** Is the objective important to the event? For instance, if the main driver for the event is to encourage community activity – do you really need to attract tourists as a priority?
- ▶ **Time-Based:** There must be a clearly stated start and completion date for each objective.

As a guide, event objectives often concern themselves with the following types of goals, but yours should be **SMART** in accordance with your own particular circumstances:

- |                                     |                           |
|-------------------------------------|---------------------------|
| ▶ Event Growth                      | ▶ Economic Benefit        |
| ▶ Event Quality                     | ▶ Tourism Development     |
| ▶ Event Sustainability              | ▶ Social Benefit          |
| ▶ Sector Development                | ▶ Educational Development |
| ▶ Audience/Participant Satisfaction | ▶ Community Development   |

**What are your event's objectives? Are they SMART? What tools and strategies will you use to achieve them?**

## 4) SWOT Analysis: Strengths, Weaknesses, Opportunities and Threats

At the beginning of the planning process if you undertake a simple 'SWOT Analysis' it will help determine the Strengths, Weaknesses, Opportunities and Threats (SWOT) in relation to the event. This will help you shape your plans.

Looking at internal and external influences that may have a positive or negative impact, consider the **strengths** and **weaknesses** of the event and how these will affect your ability to deliver it. Repeat the same exercise for **opportunities** that the event can capitalise on, and the **threats** that could undermine the event or elements of it.

Consider the following points:

- ▶ **Event Management** – experience within the organisation, staffing numbers and structure, financial stability, viability of planning, confidence of funders, etc
- ▶ **Partners/Clients** – the support they can/cannot provide: finance, influence, resources, etc
- ▶ **Climates** – social, economic, cultural and political

- ▶ **Event Benefits** – what the event offers, its ‘Unique Selling Point’ (USP)
- ▶ **Potential to Develop and Grow** – factors that will assist or hinder this
- ▶ **Other Factors** – competition, technology, legal, environment

In the initial stages of your planning process it can be useful to list the Strengths, Weaknesses, Opportunities and Threats relevant to your event in a template similar to the one below. We’ve given a couple of example entries for our fictional ‘X-Town Visual Arts Festival’.

## SWOT Template Guide

FIGURE 1.1

Strengths	Weaknesses
<ul style="list-style-type: none"> <li>▶ Experienced event management team</li> <li>▶ Supportive and active network of local artists</li> <li>▶ Good local authority support and active visual arts officer</li> <li>▶ Event vision is convergent with local visual arts and events strategies</li> <li>▶ Growing audience base</li> <li>▶ Etc...</li> </ul>	<ul style="list-style-type: none"> <li>▶ Lack of marketing and media expertise</li> <li>▶ Limited sponsorship success</li> <li>▶ Remote location</li> <li>▶ Lack of quality accommodation for overnight visitors</li> <li>▶ Poor late night transport</li> <li>▶ Etc...</li> </ul>
Opportunities	Threats
<ul style="list-style-type: none"> <li>▶ Local tourism forum keen to work in closer partnership</li> <li>▶ EventScotland’s Regional Events Programme</li> <li>▶ Local artist recently awarded major arts prize bringing increased media interest to the town</li> <li>▶ New supermarket opening in town – sponsorship possibilities attached</li> <li>▶ Etc...</li> </ul>	<ul style="list-style-type: none"> <li>▶ Increasing costs/standstill funding</li> <li>▶ Event Manager moving on next year</li> <li>▶ Competition from ‘Y-Town Arts Festival’</li> <li>▶ Etc...</li> </ul>

## 5) Other Initial Considerations: Choosing the Date and Venue

### Lead Time

Having sufficient time to plan, fundraise, market and implement the event ‘action plan’ is a critical issue. Never underestimate how long the process can actually take. Failure



to allow adequate lead time decreases the chances of success in all aspects of event planning and delivery.

Think carefully about the size and complexity of the event, the resources and funding that are required, as well as the time needed for effective promotion. Be generous and realistic in your estimate and consult with all project partners to ensure the time scale is suitable to them. Remember that factors outwith your control may reduce organisational time (*i.e.* public holidays, holidays to be taken by key team members, illness, etc) so it's a good idea to build a contingency into every element of your plan. As a general guide, successful smaller events will require at least six months lead-in time whilst larger events can take more than a year to plan, and major international events can take years from the bidding stage to delivery.

For new events, understanding the required lead time should help influence the choice of event date. When the date is set and agreed by the committee, partners, etc, it may be difficult to change it. Therefore, if you predict that something may hold up the planning process – extend the lead time if you possibly can. In some cases you will not have a choice in terms of when the event is to be held. If this is the case, before going ahead and committing to hosting the event, ensure that you undertake good initial planning in order to convince yourself (and others) that it can be delivered successfully.

## The Date

The choice of date for your event can have a major impact on its success. Careful consideration should be given to the range of risk factors involved in selecting the best date. Consider:

- ▶ **Nature of the Event** – is it an outdoor event; does it need to be staged in a particular season; is its location intrinsic to its success (*i.e.* does it have to be in a particular venue, city/town, location, etc)?
- ▶ **Weather** – what are the probable weather conditions at your preferred time of year; will inclement weather affect the event; are there contingency opportunities available?

- ▶ **Target Audience** – who are you hoping to attract to the event: is this more achievable if it is staged at a particular time of year, holiday time, at the weekend, mid-week, etc?
- ▶ **Clash Diaries** – what else is happening at the chosen location/venue; is the event diary overly busy? It's worth talking to your local authority, VisitScotland network office and other appropriate organisations to check what else is planned for your area at the time. You should also check to see if your event clashes with any similar events further afield that may also attract your target audience or participants. A good place to start are the events diaries on [www.visitscotland.com](http://www.visitscotland.com), [www.eventscotland.org](http://www.eventscotland.org), [www.sportscotland.org.uk](http://www.sportscotland.org.uk), [www.scottisharts.org.uk](http://www.scottisharts.org.uk) and your local authority website. Also think about the potential of your event competing with other wider issues and stories for media interest.
- ▶ **Complementary Activity** – are there any complementary events or activities taking place at the same time that could assist your event? Could you work together for mutual benefits?
- ▶ **Competition** – are there other similar themed or scaled events taking place that are targeted at the same audience? Is there room for your event in the marketplace at your chosen time of year?
- ▶ **Resources** – are other major events (football, concerts, conferences, etc) taking place at the same time that will impact on the resources required to stage your event (*i.e.* the availability of accommodation, staff and volunteers, hired equipment and facilities, venues, support from emergency services, local authority, etc)?
- ▶ **Other Factors** – don't forget to check out any other influencing or relevant issues *e.g.* road or building works planned in the vicinity at the same time as your event.

## Shoulder Periods

It is also important to consider the value of placing your event in 'shoulder periods' (*i.e.* times of the year outwith the main tourism season). Placing events at these off-peak times may address issues regarding the lack of resources and conflicting events, as well as introducing additional economic benefits to communities by attracting new activity and visitors in an otherwise quiet time. Events taking place in these periods

may well be prioritised for support from public bodies; however you must be confident that you can attract the necessary level of audiences/spectators/participants when considering this option.



### TOP TIP

Once you have agreed the date, make sure that you inform everybody who will help you deliver the event. If there is a **clash diary** held by your local authority, VisitScotland network office, or relevant sector body, ensure your event date is listed. This should help minimise the risk of a later-planned event clashing with yours.

## The Venue

The nature of your project will help dictate the type of venue you select. Events are held in many different locations, from established venues to open spaces. Your motivation for choosing a particular venue may include practicality, financial viability, facilities, uniqueness, location, layout, perception, etc. The bottom line is that the venue must be able to meet the needs of the event and its audience. Consider the following:

- ▶ **Event History** – where has the event been held in the past; what were the pros and cons of holding it there (remember – never underestimate the impact of an existing event venue: its location and how it is perceived may well be a powerful tool in drawing audiences/spectators/participants); are there any benefits in changing venue; are there other elements being added to the event that require additional facilities or space?
- ▶ **Venue History & Reputation** – what venue(s) fit with the qualities and principles of the event; are certain venues synonymous with your individual event type; will a particular venue give added kudos or be detrimental to the event?
- ▶ **Location** – does the event need to be located in the centre of town; does the location have potential to expand with the event; are there necessary facilities nearby such as transport links, accommodation, etc?
- ▶ **Budget** – will the budget support the choice of venue; have all the possible costs been considered?

- ▶ **Conditions of Contract** – are you required to use the venue’s own technical staff; does the venue insist on supplying catering and bar facilities; what type and level of insurance is required on your part and what is covered by the venue; what are the terms of payment; will any of these requirements have an impact on the financial viability of your event?
- ▶ **Audience** – what capacity is required (this time and in the future as the event grows); is it accessible for people with disabilities or special needs; will your target audience identify with the venue?
- ▶ **Services & Resources** – what support can the venue offer (staffing, security, administration, production, bar facilities, toilet facilities, etc)?
- ▶ **Transport & Parking** – can staff and audience park at or near to the venue; are there good public transport links; can production and other services/deliveries unload and park as necessary at the venue; are VIP and disabled spaces available?
- ▶ **Timing** – can the venue accommodate the entire event requirements: event build, live event and take-down; is there a potential clash with other events or activity happening at the same time, before or after your event?
- ▶ **Permissions** – what permissions are required (landowner, licences, sanctioning, road closures, etc)?
- ▶ **Infrastructure and Layout** – what space is required for all aspects of the event (production compound, event parking, audience, staging, signage & branding, artists/competitors, press, exclusion zone, etc); what level of infrastructure do you require and what kind of work (if necessary) are you prepared to undertake to get the venue to a useable state?
- ▶ **Restrictions** – what are the venue opening and closing times (during the event build, live event, and take-down), do you have 24hr access; is there a corkage charge, administration charge, etc; can you display your sponsors’ signage or will it clash with existing venue sponsors or suppliers?

- ▶ **Reinstatement** – who is responsible for clean-up, rubbish removal, reinstating street furniture, ground works, etc; what are the estimated costs; is a bond required to be paid in advance to cover the cost of damages to the venue or land?

Deciding on the right venue for your event can be a lengthy process requiring lots of investigation. However, the time spent doing this will be worth it and may save you trouble, disruption and unnecessary expenditure in the longer term.

Having undertaken the above initial planning exercises you should now have a solid foundation upon which to move forward. You will have consolidated your thoughts and will have a clearer vision of how you want your event to develop. You will be assured that the event is basically deliverable and its objectives are realistic.

## The Event Action Plan

The next stage is to start formulating an **Event Action Plan**. This is different (but works in tandem with) the **Business Plan** which we will talk about in the next chapter. To be clear, the Event Action Plan is a live management tool that details key project milestones and activity against a timeline – it should be continually reviewed and updated as the event planning and operations progress. The Business Plan, on the other hand, is a strategic vision and planning document which outlines the event objectives, states the business case and gives financial projections and information over a given time period (often 3–5 years). The Business Plan should be reviewed at key stages as agreed by event partners (most likely at the beginning of each planning stage). The Event Action Plan should also appear in the body of, or as an appendix to, the Business Plan (see Chapter 2 for Business Plan guidance).

Although you may have a good idea as to how the event will be developed and delivered, it is important to commit your thoughts to paper. This is essential in order to help you understand and share what has to be done, when and by whom. It's also a requirement if you are looking to convince others to invest in your event. Putting together the Event Action Plan is a straightforward task that involves listing key activities against a timeline and stating who will be responsible for delivering each element. Critically, it will help you to ensure you have enough time to complete all necessary tasks and help all involved understand their responsibilities.

Key activities listed in your Event Action Plan may include:

- ▶ Writing/updating the Business Plan
- ▶ Identifying event partners and supporters
- ▶ Sanctioning/permissions
- ▶ Recruitment and training
- ▶ Fundraising activity and deadlines
- ▶ Licensing, legal or insurance issues
- ▶ Budgeting milestones
- ▶ Key meetings – *i.e.* steering group or sub-committee meetings
- ▶ Confirming venue(s)
- ▶ Booking or commissioning programme elements
- ▶ Pre-production/production milestones
- ▶ Implementing the Marketing Strategy
- ▶ Media activity
- ▶ Event build
- ▶ Live event
- ▶ Event 'take-down' or 'de-rig'
- ▶ Monitoring, evaluation & reporting

It's really up to you how you set out your Event Action Plan as appropriate to your event, but it may be helpful to table the plan on a month-by-month basis to help build a chronological calendar of tasks leading up to the event. Remember to build in contingency time for any tasks you are not certain can be completed by a particular date or for those that require outside influence or assistance. Use team meetings to update the plan and then make sure that all revisions are circulated to those who are working from the plan.

Depending on the size and complexity of your event, you may have separate, more detailed Action Plans for different work areas or 'departments'. For example, you may have one for marketing, one for production, one for fundraising, etc. It's a useful approach to be able to show the entire activity timeline and also to be able to break it down into 'departments'.

The complexity of your event will determine the complexity of your Event Action Plan. You may have project management software to help you put together your plan, but if not, a simple activity/month table is useful.



FIGURE 1.2 CONTINUED

Activity	Responsibility (insert name)	J	F	M	A	M	J	J	A	S	O	N	D	J	Status
<b>Fundraising:</b>															
List and insert milestones															
<b>Programming:</b>															
List and insert milestones															
<b>Production</b>															
List and insert milestones															
<b>Licensing and Legal</b>															
List and insert milestones															
<b>Monitoring / Research</b>															
List and insert milestones															
<b>On Site</b>															
List and insert milestones															
<b>Live Event</b>															
List and insert milestones															
<b>Take Down / De-Rig</b>															
List and insert milestones															
<b>Reporting</b>															

In this chapter we have outlined the broad key stages in the initial planning of an event and we've suggested a few exercises to help you start planning your event effectively.



### TOP TIPS

- ▶ Don't just 'wade in' – plan your activity from start to finish against the lead time available
- ▶ Be well placed to communicate your event vision, mission and objectives
- ▶ Make a list of your current and potential stakeholders and don't be afraid to pick up the phone and ask their advice at an early stage
- ▶ Don't expect others to read your mind





**Keep  
it simple**

chapter two

# **business planning**



**REDUCE  
SPEED  
NOW**

## **An event Business Plan serves to communicate the strategic plan for taking the event forward, usually over a period of three to five years (if it is not a one-off proposition). Every event should have a Business Plan.**

Regardless of the scale, age or history of your event, the Business Plan is an essential tool that will:

- ▶ Communicate the vision, purpose and benefits of the event to others
- ▶ Enable you to focus on the event's potential to develop and grow
- ▶ Illustrate and help secure the event's viability and sustainability in the longer term
- ▶ Show how much money is needed and what it is needed for
- ▶ Help you plan the resources, delivery and operating structure
- ▶ Help you raise funding
- ▶ Help you measure success

Don't let the term 'Business Plan' put you off. You are likely to have already thought about everything you write in the plan many times over. By writing it down, it will help you organise your thoughts, share them with others and allow you to make mistakes on paper before putting plans into action. A Business Plan doesn't have to be complicated. Keep it simple and logical. Use your resources and invite key members of the team as well as event partners (if appropriate) to contribute to its formation so that the plan is 'owned' by the team. Key areas to be addressed in an event Business Plan include:

- ▶ The event's vision and mission – *i.e.* what it ultimately aims to achieve
- ▶ Who the key stakeholders are, what benefits they will accrue and how the event fits with their strategies
- ▶ The relevant experience and track record of the organisers
- ▶ The event's background and an overview of plans for the current year

- ▶ The SWOT analysis (identify strengths, weaknesses, opportunities and threats)
- ▶ The audience/spectator/participant profile (existing and targets)
- ▶ Key objectives and achievement strategy for the current year
- ▶ A development plan – key aims and objectives going forward (beyond the current year)
- ▶ Marketing and communications planning
- ▶ Event requirements – staffing structure, facilities, services, venues, etc
- ▶ How much the event will cost – budget projections over 3–5 year period
- ▶ How will it be paid for – identifying income streams
- ▶ Management and business controls
- ▶ Risk management and contingency plans
- ▶ Future considerations

Below is a broad guide intended to help you create your own unique Business Plan. Add or exclude elements that you feel are appropriate to your event and situation – there is no right or wrong format. The scale and complexity of the event will determine the size of the plan so don't be alarmed if your final document seems too short or very long. As long as key issues pertinent to your event are thoroughly addressed and it is written in plain English, it will be a very useful document that gives you, and others, confidence to take the event forward.

The following guidance sets out a logical sequence for compiling a generic event Business Plan. It is not suggested that this approach will fit all events, but it should give you a starting point if you feel you need guidance.

# BUSINESS PLAN GUIDE

FIGURE 2.1

## Cover Page

- ▶ Prepare a cover page with the name of the event, title of the document and period that the plan covers. Include your event logo/visuals and your contact details

## Contents

- ▶ Create a contents page to ensure the plan is easy to navigate. List the chapters and chapter contents with page numbers shown alongside
- ▶ If appropriate, indicate the distribution list
- ▶ Ensure that you date the plan

## Executive Summary

The executive summary should extend to no more than two or three pages and should contain an overview of the following:

- ▶ What the event is
- ▶ The event's vision & mission
- ▶ Its objectives
- ▶ When and where it will take place
- ▶ Why the event has been developed
- ▶ Who the event aims to attract (the market)
- ▶ What the key benefits of hosting the event are – to the community, sector, stakeholders, etc
- ▶ Who developed the event and Business Plan
- ▶ Statement as to the estimated event income and expenditure
- ▶ Business Plan review (i.e. plans for monitoring and updates)
- ▶ What the main sections of the Business Plan are

## 1. Background & History

This section should include information on:

- ▶ **Event Management** – outline who you are and what your relevant experience and track record is
- ▶ **Event History** – is this the event's first year; where did the idea come from; have there been similar events; has it previously been staged elsewhere; what kind of event is it; who does it attract?
- ▶ **Present your SWOT analysis**

## 2. Event Overview – Current Year

This section should set out plans for the ‘live’ event year:

- ▶ **Restate your vision and mission**
- ▶ **Key Objectives** – clearly state the key objectives and how each will be delivered. Set timescales and identify who each action will be led by (i.e. which organisation/individual)
- ▶ **The Event** – describe the event and its various elements in more detail. Give an overview of the intended event content/programme and any new developments
- ▶ **Target Market** – give an outline of the existing audience/spectator/participant profile (if there is one) and state targets for growth and development (you should go into more detail in section 5)
- ▶ **Stakeholder Involvement and Benefits** – describe the involvement and benefits each stakeholder should expect (event partners, public funders, sponsors, supporters, host venue/city, the local community, etc). Make sure you state where the event and stakeholder strategies align

## 3. Development Plan – Going Forward

This section should present an outline of how the event will develop over the next 3–5 years:

- ▶ **Strategic Development** – with your vision and mission in mind, outline your key objectives and how they will be delivered and developed beyond the current year; set timescales and identify who will lead each action (i.e. organisation/individual)
- ▶ **Development Implications** – summarise the policy you will apply to ensure quality control and a relevant programme of events
- ▶ **Strategic Alignment** – going forward, describe how your event may deliver to the strategic plans of your current and potential stakeholders

## 4. Event Requirements

This section should outline what is required on an operational level to deliver the event:

- ▶ **Facilities** – what facilities are required in terms of public utilities, accommodation (on and off site), catering, communication, other technology (such as timing equipment for sporting events), etc
- ▶ **Services** – what services will be required and who will provide them: medical, police, child protection, fire, traffic management, health & safety, security, media, etc
- ▶ **Production** – detail the production equipment required such as power, fencing, staging, sound, lighting, vision, heavy plant, etc
- ▶ **Legal & Insurance** – consider the implications of contractual arrangements and the necessary insurance required to cover all aspects of the event
- ▶ Etc...

## 5. Marketing & Communications Plan

This section should describe who your audience/participants/spectators are and how you will reach them:

- ▶ **Situational Analysis** – provide outline information about existing audiences/participants/spectators; strengths, weaknesses, opportunities and threats with specific reference to the marketing and communications effort
- ▶ **Targets** – identify primary and secondary target markets for each year of the Business Plan
- ▶ **Marketing Strategy** – set aims, objectives and achievement strategies
- ▶ **Communications/Media Strategy** – outline the key communication messages and how they will be delivered against a timeline
- ▶ **Marketing Action Plan** – plot activity against a monthly timeline
- ▶ **Budgets and Resources** – show how you will finance and resource the plan
- ▶ **Monitoring, Research and Evaluation** – set out how you will monitor and evaluate the success of the Marketing and Communications Plan. Describe how you will research and monitor your audiences/participants (further guidance is provided in Chapter 12).

## 6. Financial Plan & Considerations

This section is crucial. You need to show that the event is financially viable and achievable.

- ▶ **Income and Expenditure Projections** – present detailed event budgets and cash flow projections for the period of the plan (see Chapter 4 for guidance).
- ▶ **Budget Notes** – as necessary, explain how you have arrived at these figures; explain any assumptions that have been made; give information about funders' commitments
- ▶ **Revenue Plan** – outline targets and strategies for securing funding and sponsorship and other incomes; include expected time scales and contingency plans (see Chapter 5)
- ▶ **Investment Appraisal** – what value for money does the event bring; who/what benefits and how will this be monitored
- ▶ **Economic Impact Estimation** – the additional income that holding the event will bring to your area/economy

## 7. Management & Business Controls

In this section you need to show that you are set up to manage the event appropriately:

- ▶ **Management & Organisation** – Outline the legal status of the organisation and be clear about event ownership. Detail key management and stakeholder roles and expertise; show the organisational structure and chain of command (see Chapter 3 and 7).
- ▶ **Event Action Plan** – set out a clear timetable covering all aspects of event delivery (see Chapter 1)
- ▶ **The Business** – describe how you will keep track of the business; describe the management and administration systems that will ensure the smooth running of the event
- ▶ **Other Records** – explain the other systems you will put in place to monitor progress of each operation, when will you do it, who will do it, etc
- ▶ **Management Information Systems** – how will you measure objectives against levels of achievement (marketing, budget, etc) and how will you provide reports?
- ▶ **Review** – state when the plan will be reviewed and whose responsibility it is to do so

## 8. Risk Management

In this section you should explain how you will address the Risk Management process:

- ▶ **Risk Factors** – identify key risk factors (e.g. with respect to your objectives, programme, finances, operations, reputation, legal, audience, health & safety, etc). Show how you will manage and mitigate risks and provide an initial risk assessment (see Chapter 9)

### Appendices:

These may include appropriate documents such as:

- ▶ Additional financial information
- ▶ A site/venue map
- ▶ Previous research and economic impact information
- ▶ Equal opportunities policy
- ▶ Health and safety policy
- ▶ Ethical practices
- ▶ Code of practice/staff briefing document

## How should the Business Plan be presented?

Your plan should be easy to read and navigate. It should be typed up in a clear font with good spacing. Each page should be numbered and the whole document bound. Make sure you produce multiple copies to distribute to key team members, funders and stakeholders as necessary.

If the plan is being presented in person at any point (*i.e.* to a potential funder), ensure the presenter is familiar with all aspects of the plan and they have good face-to-face presentation skills.

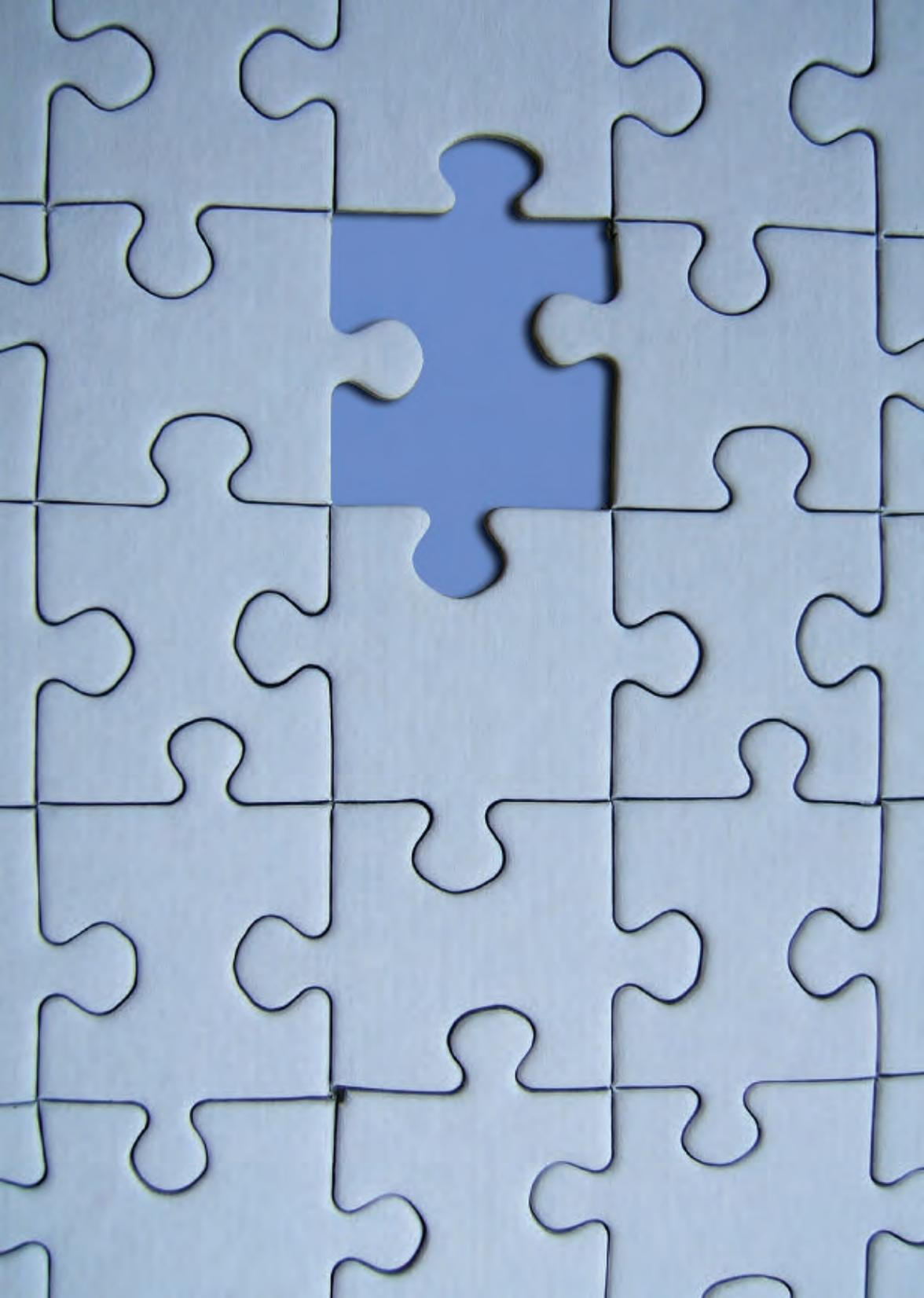
## Reviewing the Plan

Unless otherwise agreed with event partners, it is likely you will wait until the current year's event has been staged and the evaluation process completed before you reassess the plan. A review period should be calculated into the Event Action Plan to ensure the exercise is completed in enough time to action new objectives and raise funds for future years.



## TOP TIPS

- ▶ Maintaining good records, documenting your activity and producing plans is not about keeping funders and stakeholders happy. It helps you operate more efficiently, communicate what has to be achieved, and avoids the need to 're-invent the wheel' each time you start your event planning.
- ▶ Think laterally and save time – remember you should be able to cut and paste standard information sections from your Business Plan into funding applications as appropriate.
- ▶ Once you have written your plan, make sure you keep it as a 'living document'.
- ▶ Keep it simple.



chapter three

# putting the team together



## **There are no ‘off the peg’ organisational structures that can be employed to deliver events. Each event is as individual as the objectives it aims to achieve – and the people that deliver it.**

Information regarding the legal status of organisations operating events is given in Chapter 7. At this point however, it’s worth underlining that event organisers come in many shapes and sizes, including:

- ▶ Professional event or festival organisations (not-for-profit)
- ▶ Professional event management companies and promoters (commercial)
- ▶ Public/private partnerships
- ▶ Events departments within parent organisations or companies
- ▶ Local authorities
- ▶ Freelance event organisers working for, or on behalf of, public bodies or private companies
- ▶ Tourism forums and organisations
- ▶ Local promoters
- ▶ Voluntary groups
- ▶ Trusts
- ▶ Charities
- ▶ Governing bodies of sport
- ▶ Clubs and associations

## **The Event Team**

Whatever your particular set up, it is key that you select the right team with the relevant skills to take the event forward. During your initial planning you will have identified what has to be delivered. Putting the right team together is essential to success. Depending on the type and size of your event (and the resources available to it), key areas of responsibility may include:

- ▶ Event Director
- ▶ Event Producer/Manager

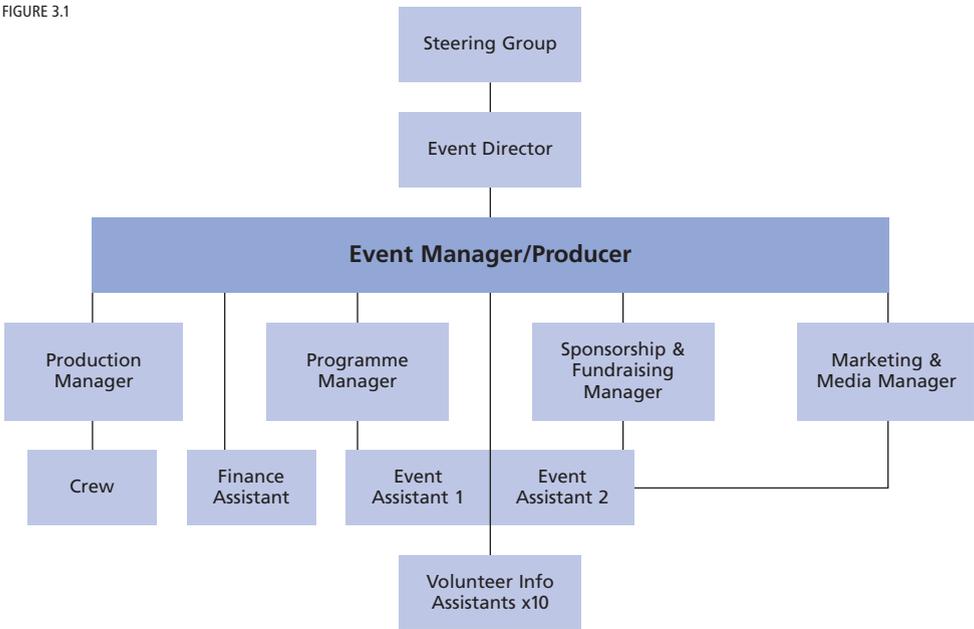
- ▶ Production Manager
- ▶ Event Administrator
- ▶ Event Assistant
- ▶ Finance Assistant
- ▶ Marketing Manager
- ▶ Media Manager
- ▶ Site/Venue Manager
- ▶ Fundraising/Sponsorship Manager
- ▶ Programme Manager
- ▶ Production Designer
- ▶ Information Assistants
- ▶ Artist/Participant Liaison
- ▶ Stage Management
- ▶ Production Crew
- ▶ Runners

The above list simply provides an example of the kinds of roles that may be appropriate to an event. It could be that your event requires a range of roles, a much expanded team, or maybe just two or three people supported by volunteers to deliver all aspects of event management. Whatever the case, ensure that you are sufficiently equipped to meet the challenge.

The process of putting the team together starts with drawing up job descriptions for the various roles you wish to create. These should state simply and clearly what you expect each person to do. This should help you clarify the actual roles you need to put in place and the skill sets required. The next stage is to decide the nature of each agreement: are you seeking a freelancer, short-term contractor or permanent member of staff? Will you pay weekly or monthly? Will you pay overtime? How many hours a week? How many days holiday? Will any bonuses be paid? You should aim to provide the right conditions to attract the kind of staff required within the budget available.

Once you've decided on the roles that you require, it's a good idea to draw up an organisational chart or staffing plan setting out the structure of your event team. This will help you demonstrate the chain of command. Here's an example of what this might look like for our 'X-Town Visual Arts Festival'.

FIGURE 3.1



**Recruitment:** If possible, plan your recruitment activity well in advance. If you are advertising posts, ensure you leave plenty time for the advert to be placed, interviews to be held and any notice periods to be worked, etc. Don't forget that you can seek recommendations from other event managers (many event professionals are freelance and move from event to event as a result of recommendation). Ensure that you always take up references for any new members of your event team. Getting the balance right in the team is a key consideration – event staff often have to work very closely together for long hours in pressurised environments, so make sure your team members complement each other. Always provide a job description and formalise your recruitment agreements in writing, ensuring that rates of pay (or basis of voluntary work) are clearly understood and accepted.

**Legal obligations:** For general information and advice regarding best practice and your legal obligations as an employer visit [www.dti.gov.uk](http://www.dti.gov.uk), [www.businesslink.gov.uk](http://www.businesslink.gov.uk) or [www.bgateway.com](http://www.bgateway.com) (also, see Chapter 7 for further advice).

**Clarify roles:** ensure that each member of the team has a clear understanding of what their, and their various team mates', roles entail, what is expected of them and who they are responsible to.

**Internal Communications:** It is essential that you operate good internal communications. Hold regular team meetings to update the Event Action Plan and to ensure that all key members are familiar with and understand the issues and challenges. These meetings are also an opportunity for team members to raise their own points and to share knowledge and experience.

**Work Experience Staff:** If you offer students the opportunity to gain work experience on the event, ensure that you are equipped and able to instruct/mentor/supervise them and provide feedback. Put your agreement in writing, ensuring that you clarify the scope of the work and state if it will be paid or on a voluntary basis, etc.

**Volunteers:** If you are considering using volunteers to assist with the event, ensure that you are able to clearly specify what is required of them; the types of roles you wish them to perform; hours; training; incentives; who they report to; how to deal with incidents and an idea of what to expect on the day, etc. Volunteers need to be managed carefully and your relationship with them will be different to your relationship with paid staff. Remember, volunteers are giving up their time to work on your event and they are likely to have specific reasons for volunteering. To select and get the best out of your volunteers, it's a good approach to find out what they are looking to get out of the experience and to try to match their skills and personality with the appropriate role. For example, a receptionist could work well in an information booth or dealing with participants, whilst someone with less practised communication skills may prefer working in a less public-facing role. Keep volunteers well informed/briefed about the event, particularly if their role involves contact with the public. It is always a nice touch to recognise the contribution of volunteers by providing a small gift/certificate upon completion of the event. For additional information and advice visit the website of Volunteer Development Scotland [www.vds.org.uk](http://www.vds.org.uk) (see also [www.volunteering.org.uk](http://www.volunteering.org.uk), [www.askncvo.org.uk](http://www.askncvo.org.uk) and [www.businesslink.gov.uk](http://www.businesslink.gov.uk))

## The Wider Team

When we talk about the '**Event Team**' we mean the key individuals employed (or working on a voluntary basis) to deliver the event. In addition to the core event team, it is likely that there will be many others who will make up the wider team responsible for the event's success. These may include, for example:

- ▶ **Steering Group** – events that involve partnership working and funds are usually overseen by a 'Steering Group' often made up of representatives of the various partners. This group is responsible for giving advice and general direction to the event and for ensuring that the interests of all funders are appropriately delivered. The Steering Group may represent the board (if there is one), or there may be a separate Board of Directors responsible for key policy decisions. Dates for Steering Group meetings should be agreed well in advance to ensure good attendance and engagement from all partners.
- ▶ **Board** – depending on your structure, you may well have a Board instead of (or as well as) a Steering Group. A Board is likely to have direct liability for the event as well as responsibility for policy and direction, whilst a Steering Group usually works in an advisory capacity only. Whatever your situation, you will need to determine where the ultimate responsibility and decision-making power lies.
- ▶ **Sub-Groups** – aside from the event team and Steering Group, events often need to create sub-groups in order to address and effectively manage certain issues/areas. For example, for a major outdoor event, it is likely that a joint-agency sub-group involving the event management, emergency services, police, local authority and security contractor will be convened to consider and action Health and Safety planning. Other groups such as a 'marketing sub-group' and 'programming sub-group' may be formed. Only form sub-groups as necessary – not for their own sake – and keep subscription restricted to those with the required knowledge, experience and ability to provide active input. As the event manager, you should act as the coordinator for all sub-groups and should feed all outcomes back to the event team and Steering Group/Board.

## Other Services

In addition to the above, the services of additional staff, contractors and suppliers are usually required. These may include:

- ▶ Event officials
- ▶ Security
- ▶ Stewarding
- ▶ Medical
- ▶ First Aid
- ▶ Catering
- ▶ Box Office and Front of House
- ▶ Technical: staging, structures, lighting, sound, power, etc
- ▶ Market researchers
- ▶ Concession operators
- ▶ Legal and other business services

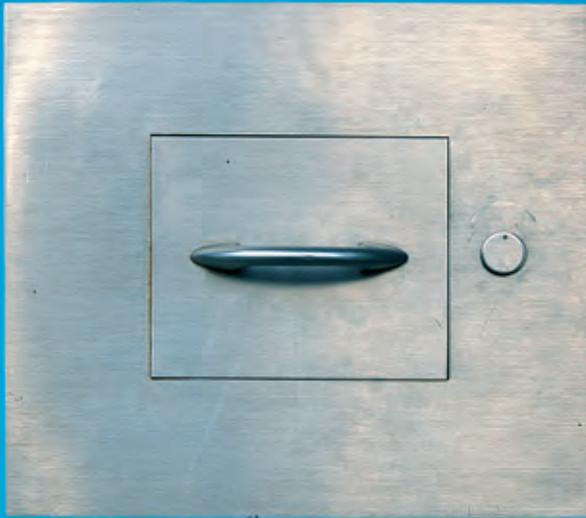
**Ultimately the success of your event will be directly related to the effectiveness of your team and overall structure – so take time in the early stages to plan and get this right.**





chapter four

# **budgets and financial management**



YES



NO

## **Good financial management is fundamental to the delivery of successful events. Our advice is simple: plan ahead, be realistic, keep on top of your budget and implement control systems that work for you.**

Right from the start, ensure that you set a realistic budget with inbuilt flexibility and identified contingencies. If you are looking to raise public funds or sponsorship, don't approach a potential funder until you are able to present a realistic outline budget. Remember, you need to convince yourself of the event's financial viability before you can convince others.

### **Transparency**

Those applying for (and in receipt of) public funds will be required to provide detailed financial information about the event and wider company finances. For management and reporting purposes ensure that you keep separate, or are able to separate, all financial information to do with the event. Never try to 'fudge' figures or provide misleading information. Funders will often require sight of your annual accounts and may well reserve the right to carry out an audit to ensure their funds have been used in the agreed manner. Aside from funders' requirements it is best practice to present and keep transparent accounts.

### **Preparing your Budget**

Your event budget is basically a projection of all income and expenditure relating to the development and delivery of the event. To help you manage event finances effectively it's a good approach to keep a 'live budget' on your computer – *i.e.* a spreadsheet that you update on a regular (daily/weekly) basis. Set up your budget in a package such as Microsoft Excel so that you have numeric functions to help you manage the financial data.

The following template gives an example of the kind of entries that may be appropriate to your event, but your entries should of course be specific to your particular situation:

FIGURE 4.1

<b>Live Event Budget – Summary</b>				
Description				
INCOME		1. Projected (£)	2. Income to date (£)	3. Variance (1–2)
1	Grants / Underwriting / Public Funding (list all)			
2	Trusts / Foundations (list all)			
3	Sponsorship (list all)			
4	Ticket Sales / Admissions			
5	Merchandising			
6	Other Income			
Total Income		£	£	£
EXPENDITURE		1. Projected (£)	2. Spend to date (£)	3. Variance (1–2)
Administration				
1	General Administration			
2	General Insurance			
3	Travel & Accommodation			
4	Staff Salaries & Fees			
5	Management Fees (if applicable)			
6	Other Administration Expenses			
Subtotal Administration		£	£	£
Event Costs				
1	Event Evaluation / Bid Costs			
2	Sanction Fees (if appropriate)			
3	Facility / Venue			
4	Other Production Costs (Plant, Equip. Hire, Crew, Security, etc)			
5	Health & Safety			
6	Insurance			
7	Ceremonies			
8	Entertainment / Artistic Programme (fees & costs)			
9	Hospitality			
10	Cost of Merchandising			

FIGURE 4.1 CONTINUED

11	Travel, Accommodation & Services			
12	Communication (Radios, etc)			
13	Ticket Production			
14	Other Event Expenses			
	<b>Subtotal Event Costs</b>	£	£	£
<b>Marketing &amp; Promotion Expenses</b>				
1	Advertising			
2	Design Fees & Print Production			
3	Direct Mail / Distribution / Display			
4	Internet			
5	Media & PR			
6	Market Research			
7	Other Marketing & Promotions Expenses			
	<b>Subtotal Marketing &amp; Promotion</b>	£	£	£
<b>TOTAL EXPENSES</b>				
		£	£	£
<b>ADD CONTINGENCY (5% OF TOTAL EXPENSES)</b>				
		£	£	£
<b>TOTAL EXPENSES + CONTINGENCY</b>				
		£	£	£
<b>Surplus / Deficit</b>				
		£	£	£



## Budget Preparation Tips

- ▶ Ensure that you build appropriate contingencies into your budget.
- ▶ Present your budget clearly and make sure it is easy to read and interpret.
- ▶ Be realistic. Never include funding sources that are unlikely to materialise.
- ▶ If relevant – for example, if the event finances are processed through a parent organisation – ensure the cost centres you set up in your event budget (*i.e.* marketing, production, etc) integrate with the ‘parent’ accounts system.
- ▶ Each and every item of event income and expenditure should be recorded in your event budget.
- ▶ The complexity of your budget will depend on the size or nature of your event. If the budget is extensive, and you are employing a software package such as Microsoft Excel, it’s a useful approach to link worksheets to the front page ‘budget summary’ in order to keep a detailed breakdown of each line in the budget.
- ▶ State clearly if your budget is presented as NET (it does not include VAT) or GROSS (it does include VAT). Broadly speaking, if you are VAT registered and able to reclaim the VAT keep a NET event budget. If you are not VAT registered and therefore unable to reclaim the VAT keep a GROSS event budget. If in doubt, seek the advice of your/an accountant.
- ▶ Be aware of the VAT status of any income that you receive. For example, grants are generally not subject to VAT but commercial sponsorship is likely to be. Errors or misunderstandings can be costly.
- ▶ Ensure you understand your liability to pay VAT on ticket income and other sales.
- ▶ Be conservative with regards to ticket income targets. When entering a projected ticket income, ensure that you have worked out exactly how many tickets you would have to sell to achieve it. Remember to take into account any tax deductions, concession rates, group bookings or special offers and their likely impact on your target.

- ▶ It is important that you record the value of any 'in-kind' support you receive. However, to avoid getting your 'in-kind' values mixed up with the actual cash at your disposal, it's advisable to keep a note of your in-kind support separately. If you do choose to show 'in-kind' figures in your budget, make sure you enter the value as an income as well as expenditure and mark both entries as 'in-kind'.
- ▶ Always back-up and archive your budget as necessary. Ensure that you keep a record of which versions you have presented to outside parties such as funding partners.

## Control Mechanisms

- ▶ **The Budget Holder:** It's advisable that one person is ultimately responsible for updating and managing the overall budget – ideally the event manager or producer. If others in the team are given authority for certain budget elements, set control mechanisms in advance and ensure they understand and agree the level of budget available to them.
- ▶ **Coding:** If relevant, set up an appropriate invoice coding system so that budget information can be easily entered (and filtered) in accordance with any existing accounts system.
- ▶ **Purchase orders:** Where possible, raise purchase orders. These not only provide a checking mechanism when passing invoices for payment, but they confirm to the supplier exactly what you want and when you want it. Ensure you add delivery details and contact telephone number, especially if the order is to be delivered to a temporary event site.
- ▶ **Processing invoices:** Depending on what already exists within your organisation, it's a good idea to put in place a system for approving invoices relating to the event. One control mechanism is to attach 'approval slips' to each invoice in order for the budget holder to code them, 'sign them off' and add any appropriate notes for the book keeper (or person who writes the cheques). Whatever system you employ, ensure that invoices do not get paid until the event budget holder has approved them and has updated the 'live budget' accordingly. The point is to keep on top of all event expenditure.

- ▶ **Petty cash:** Ensure that all petty cash spend is factored into the budget. When issuing petty cash in advance, ensure that you do so in exchange for a signed petty cash slip (you can make your own or buy them from stationers). Ensure that receipts for all petty cash purchases are collected, numbered and properly coded. It's useful to provide a petty cash template for those in receipt of cash. Here's a sample template for you to adapt to your purposes.

Provide the template as an Excel file rather than as a hard copy in order to minimise errors: see figure 4.2 below.

FIGURE 4.2

PETTY CASH RECORD						
Please number your receipts and staple them to this completed form						
Name: _____						
Receipt No.	Budget Code	Description	Date	Petty Cash Received	Petty Cash Spend	Balance
			xx/xx/xx	£ 50.00		
1	Marketing/3	stamps	xx/xx/xx		£ 10.00	£ 40.00
2	Marketing/7	printer cartridge	xx/xx/xx		£ 20.00	£ 20.00
	Etc...					
	Totals			£ 50.00	£ 30.00	£ 20.00
Date returned:						
Notes:						

Note: Once you receive a completed petty cash record, exchange it for the associated petty cash slip(s) to keep your records in order.

- ▶ **Good record keeping:** Keep all your financial information on file and at hand. Make hard copies of your key documents. Back up all your computer files to CD or DVD on a regular basis.
- ▶ **Cash flow projections:** Ensure that you plan your cash flow effectively. The lack of available cash could well bring your operation to a halt and put the whole team and event under unnecessary pressure. A simple template is provided on the next page. Remember that entries in the cash flow will be GROSS (*i.e.* they will include VAT). If you are VAT registered and the event is not the sole business of the company, your VAT payments/claims should be factored in to your overall company cash flow. Again, if you are working within a wider organisational structure, ensure that you plan your cash flow with the finance department. See figure 4.3 overleaf.





DON'T LET IT ALL GO PEAR-SHAPED!

## Things to Remember on Site

### Cash

Think about what cash you will need during the event itself. Do you need till floats, prize money, petty cash, etc? Make sure you order any cash that you require from your bank well enough in advance. Remember to state the required denominations and when you need to pick it up.

### Fees

Some performers prefer to be paid at the event itself. For ease and security try to avoid this, but if it's unavoidable prepare the cheques/cash in advance and store in a locked room or safe until required. Ensure you get a proper receipt for any cash payments.

### Security

Ensure you put sufficient security measures in place that take into account the amount of cash you will have on site and the safety of those handling it. Think through the various scenarios pertinent to your event. How will you monitor and store your takings on site? Who will be responsible for handling cash? Is training required? Are staff adequately protected against possible attack? Do you need to arrange a Night Safe Service with your bank? Remember to check your insurance policy to ensure you have the right level and type of cover.

## Other Financial Issues

### Annual Accounts

The status of your organisation will determine the level of financial reporting you are required to undertake. Registered companies are required by law to prepare and submit a set of financial accounts to Companies House each year. Whilst unincorporated organisations are not required to do this, they should maintain proper books and records. For further advice visit [www.businesslink.gov.uk](http://www.businesslink.gov.uk), [www.bgateway.com](http://www.bgateway.com), [www.companieshouse.gov.uk](http://www.companieshouse.gov.uk) or speak to your/an accountant.

## VAT – should you be registered?

The supply of any goods and services, which are subject to VAT at any rate, are called taxable supplies whether you are VAT registered or not. If the value of your taxable supplies is over a specific limit, you need to register for VAT, unless your supplies are wholly or mainly zero rated in which case you may apply for exemption from registration. For further information visit [www.hmrc.gov.uk](http://www.hmrc.gov.uk) or call the national helpline 0845 010 9000.

## Gift Aid

Gift Aid allows charities to reclaim the basic rate of income tax paid on the donations. Using Gift Aid means that for every pound donated, charities can claim an extra 28 pence from the Inland Revenue. If the donor is a UK taxpayer, this means that £100 can be turned into £128 just so long as donations are made through Gift Aid. For more information on eligibility and how to claim, contact the Inland Revenue Charities Office in Edinburgh 0845 3020203 or visit [www.hmrc.gov.uk](http://www.hmrc.gov.uk) or [www.givingcampaign.org.uk](http://www.givingcampaign.org.uk)

## Keep a Record of your Assets

If you have bought items such as site or office equipment for the purposes of the event, it's useful to keep a record/register of what you have and where each item is stored. This should prevent your purchased items getting lost, forgotten about and unnecessarily replaced next time round.

## Future Planning

When planning the event's finances over a period of years, you can use your 'Live Budget' model (figure 4.1, page 44) and adjust it to demonstrate projected income and expenditure going forward. This kind of planning should help you concentrate on the future financial viability of the event and what you will have to do to ensure this.



36

RICHARD

Orion

Mountain Bike  
WORLD CUP  
FINISH

TISSOT

Event Budget Projection Over 3 Years			
Description	Year 1	Year 2 projection	Year 3 projection
<b>INCOME</b>			
1	Include all details		
	↓		
	Total Income	£	£
		£	£
<b>EXPENDITURE</b>			
1	Include all details		
	↓		
	<b>TOTAL EXPENSES</b>	£	£
	<b>ADD CONTINGENCY (5% OF TOTAL EXPENSES)</b>	£	£
	<b>TOTAL EXPENSES + CONTINGENCY</b>	£	£
	<b>Surplus / Deficit</b>	£	£
		£	£



### TOP TIP

Keep on top of your finances at every stage. If you lose control of the budget you have effectively lost control of the event.



chapter five

# **making it add up – fundraising**



**When predicting the likelihood of an event's success, two important questions have to be asked:**

**1) Is it financially viable?**

**2) Is it sustainable? (if it's not a one-off proposition)**

Putting aesthetics and the quality of the programme to one side, if an event is not financially viable then its success will be greatly diminished and it will not be sustainable. Therefore, it may be harder to secure future financial support.

In recent years, the cost of staging events has increased and it has become necessary for event organisers to look to a wide range of sources in order to raise the required income. When preparing the Business Plan and the Event Budget, it's a good approach to draw up a **Revenue Plan** to help you plan your fundraising.

## **What is a Revenue Plan?**

A Revenue Plan will help you assess all the fundraising options that have potential to raise income for the event. It will give confidence to existing partners and stakeholders that additional finances to meet the budget aspiration will actively be sought. By identifying income sources and deadlines, should the anticipated targets not be met, the identified contingencies should be put into action. A **Revenue Plan Template** is shown towards the end of this section.

## **Potential Funding and Income Sources**

Fundraising often has to be a particularly inventive process. Depending on the type of event, it is likely that a combination of some or all of the following income streams will be required to realise your funding objective:

- ▶ Ticket Sales (*i.e.* audiences, spectators)
- ▶ Participant Entry Fees (*i.e.* sports events)

- ▶ Public Funds
- ▶ Commercial Sponsorship
- ▶ Trusts and Foundations
- ▶ Concessions & Franchises
- ▶ Merchandising
- ▶ Showcase, Demonstration and Information Stands
- ▶ Advertising
- ▶ In-Kind Support
- ▶ Other Activities

## **Ticket Sales**

Make sure you set a realistic ticket pricing structure. Research similar events, look at their pricing structures and be aware of the expectations of your audience. Consider the impact that concessionary pricing and special offers will have on your expected income targets. If you are liable to pay VAT on ticket sales remember to calculate the net price for revenue purposes and also take into account any ticket agency commission if a third party is distributing tickets for you. If appropriate, make sure that you have sensibly negotiated any box-office splits with the venue/artists/others and agreed any guarantees against loss. Of course, not every event has an entrance fee but you may wish to consider charging for certain elements of the event programme. If this is the case make clear on your event literature any 'pay to enter' entertainment within an otherwise free event.

## **Entry Fees**

As with setting ticket prices, it is important to ensure that any participant entry fees are set at a realistic level. Research similar events to ensure that your entry fee is in-keeping with the industry norm. Consider the perception that your entry fee will create for your event, *i.e.* participants should feel they are getting value for money. Where applicable, remember to include any race levy or similar charges in the fee (and ensure this is accounted for in your overall event budget). Whatever entry fee you decide to charge, it is important that you clearly state what it actually includes on all your event information.

## Public Funds

Events supported by local authorities are usually prioritised for support by EventScotland. The reason for this is that events supported locally are more likely to be sustainable in the long-term as they fit with local strategies. It is possible that your local authority operates an events fund or that funds may be available through departments such as ‘economic development’, ‘culture and leisure services’ or through sources such as a local ‘common good fund’. Increasingly local authorities are developing events strategies and employing events officers to co-ordinate their involvement and support. When enquiring about the potential of support from your local authority, the best place to start is by asking if there is an events officer or other appropriate (culture or sports) contact that can help route your enquiry. Aside from financial support, the local authority may also be able to provide assistance with aspects of the event organisation by supplying services in-kind, advice, inclusion in ‘What’s On’ guides, etc. The contact details for all Scottish local authorities can be found at [www.cosla.gov.uk](http://www.cosla.gov.uk)

As well as your local authority, there are a range of other organisations and funding bodies that may be able to offer financial and/or ‘in-kind’ assistance. These include the Scottish Arts Council, **sportscotland**, Scottish Enterprise, Arts & Business, VisitScotland, etc. Again, a basic contacts list is provided in the Appendix. It is worth bearing in mind that most of these bodies would encourage applicants to seek partnership funding and are unlikely to be the sole investor in your event. All these funding bodies require that applicants meet specific criteria. Remember, each funder has its own objectives and your event, may or may not necessarily provide a close fit with these. Ask yourself if your event will help meet the objectives that the funding organisation itself has to achieve. After identifying the appropriate funding bodies, find out how your application should be presented and what the deadlines for submission are.

When filling in application forms, make sure you:

- ▶ Fully understand the guidelines and eligibility criteria. If you don’t understand something, don’t be afraid to phone up the fund manager to seek advice.
- ▶ Read each question thoroughly and answer it specifically.
- ▶ Give yourself enough time to complete your application and to assemble all the required supporting documents. A shoddily presented or incomplete submission will not do you any favours.

- ▶ Don't miss anything out that you feel may be of importance, but equally don't supply irrelevant information – remember someone has to assess your application in detail and will not appreciate excess or repeated information.
- ▶ Don't leave any questions blank and always present your application in the format that is requested.
- ▶ Include some event photographs, a print sample and positive press comments or endorsements in order to provide additional context to your application.
- ▶ Do not assume that the assessor or assessment panel have any existing knowledge about your event – make sure your application paints a clear picture for them.
- ▶ Get a friend or colleague to proof read your application – fresh eyes are more likely to spot errors or gaps in information.
- ▶ Stick to the deadline.

## EventScotland

EventScotland is Scotland's national events agency. It was set up to co-ordinate the delivery of the Scottish Executive's Major Events Strategy 2003–15. The strategy has a vision to make Scotland 'one of the world's foremost events destinations by 2015'. EventScotland runs two funding programmes:

**1) The International Events Programme:** EventScotland's primary purpose is to create, attract, and grow major 'international events' that have the ability to generate significant economic benefits for Scotland. International events are defined for EventScotland's purposes as those that can attract high levels of visitors or participants to Scotland whilst placing Scotland on the international stage through significant positive media coverage with an international reach.

**2) The Regional Events Programme:** This programme is designed to complement the International Events Programme by showcasing specific towns and regions across the country and driving domestic tourism. Whilst the majority of International Events are likely to take place in our larger metropolitan areas of Glasgow and Edinburgh, the Regional Programme has been created to support cultural and sporting events held outside these areas.

The objectives of the Regional Programme are to develop a portfolio of events that will:

- ▶ Generate economic benefits for specific regions of Scotland

- ▶ Attract visitors to a region from other parts of the country
- ▶ Enhance the profile and appeal of the host region
- ▶ Inspire and involve local communities

This is a development programme that provides one-off funding. It is not a traditional grants programme providing long-term or core funding. It has been created to support additional elements or new activity specifically designed to help the event grow.

For more information on EventScotland's activity and to review the criteria for the support programmes, visit [www.eventscotland.org](http://www.eventscotland.org)

## Commercial Sponsorship

Put simply, when a company sponsors an event it usually means that it provides cash in exchange for a number of benefits. Trying to raise commercial sponsorship is likely to take up a lot of time. You may elect to keep the process in-house by allocating yourself or a member of the team to raise the sponsorship or you may decide to draft in the services of a freelance sponsorship professional with existing contacts. If employing the latter, expect to pay a retainer fee plus a percentage of the revenue achieved. These outgoings should be negotiated in advance, agreed in writing and included in your budget. However, because the professional will have existing contacts, the process can be more effective than if facilitated in-house. To assist in your quest for sponsorship, we have included a section titled 'Sponsorship Proposal' that can be found at the end of this chapter.

## Charitable Trusts and Foundations

Trusts and foundations tend to fund projects or initiatives that find it hard to attract mainstream funding. There are thousands of trusts in the UK and many of them do contribute an amount of their budget in the form of grants to cultural and sports projects. Each has strict criteria that are likely to include the funding of charitable organisations and causes only. Check their guidelines thoroughly to see if your project fits with their grant making criteria and objectives.

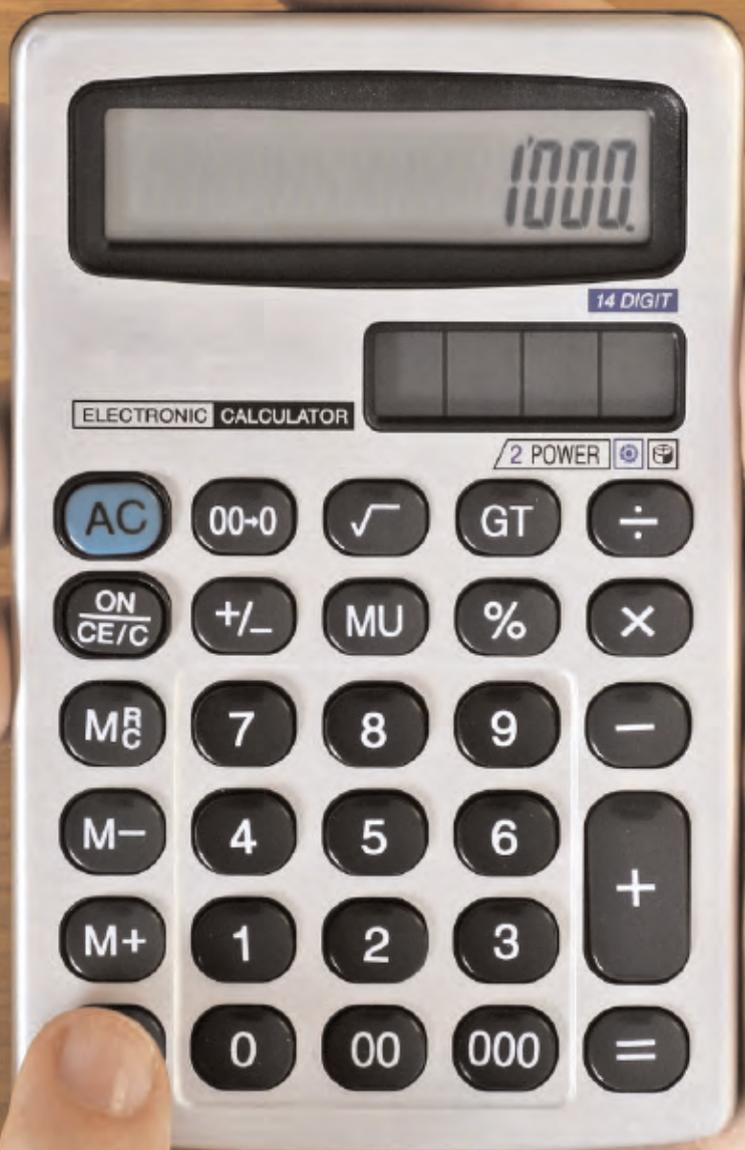
## Concessions & Franchises

Selling concession and franchise rights can be a very good way of raising revenue, particularly at well attended events. Food and beverage rights are the most obvious but you may be able to include other products that fit with the ethics, the programme or the audience profile of your event. If your event is receiving a grant from your local authority or other public sector funds you should check if it is necessary to 'put to tender' any such opportunities. This can also be the better way to achieve best price. Invite companies to bid for the opportunities by a set deadline making sure you give realistic information about the event, expected audience and site position, etc. Insist on non-collusion and ask those that tender to set out their proposed product pricing structure to be used for the event. Decide whether you will be using one or more companies and notify them of any product sampling or other companies that may have an impact on their sales. A basic template and further advice on the tendering process is included at the end of this chapter.

If you plan to have a funfair at your event, consult with The Showmen's Guild in the first instance. The Showmen's Guild is the representative body for showmen and is a good reference point for Guild rules. It will be able to provide a list of companies who offer funfair and amusement rides for events. If there is no history of a funfair at your event, put this element out to tender but remember that the successful operator may have the rights to operate the funfair at the event in the future and may not need to offer you a greater fee than that which was offered in year one. More info at [www.showmensguild.com](http://www.showmensguild.com)

## Merchandising

For certain events, the sale of event-specific merchandise such as branded clothing and gifts can have revenue raising potential. However, merchandising is not appropriate for all events and, if it is not planned properly, it can be a major draw on resources. You may also end up with a lot of leftover stock that you cannot sell. Thorough assessment of the potential is therefore required. You may decide to approach a professional merchandising company in the first instance. They will immediately see any merchandising potential, tell you what service they think they can provide and work out the revenue potential. Speak to more than one company for reassurance. If you decide to use one of them you could license the merchandising rights for the



ELECTRONIC CALCULATOR

14 DIGIT

2 POWER

AC	00-0	$\sqrt{\quad}$	GT	$\div$
ON CE/C	+/-	MU	%	$\times$
M <sup>R</sup> C	7	8	9	-
M-	4	5	6	+
M+	1	2	3	
	0	00	000	=

event for a fixed fee or a percentage of profits. Make sure you have a detailed contract with the merchandising company that includes clear details about the agreed product range, the expected quality, where and when the merchandise can be sold, how the brand and any logos are to be used/portrayed, the length of time your agreement runs and an agreed system for monitoring sales. Insist on full approval of all items. If you decide to produce and sell merchandise independently don't leave yourself financially exposed by over ordering. If possible, test the market with limited stock one year and build from that experience.

## Showcase, Demonstration and Information Stands

Some companies like to sample their products direct to the target consumer at events. Others, who have no product, but are promoting services or causes sometimes take information stands at events. Be careful to ensure that any product/service on offer is in line with the event's ethics and target market profile. As a general rule, the higher the profile of the event and the larger the audience, the more you can charge. Before targeting appropriate companies, make sure you clearly understand what you have to offer and how much you will charge for it. Be careful that competing brands do not clash and any demonstrating companies do not end up getting more exposure at the event than your main sponsor (who is likely to have paid considerably more to be involved). If a company is sampling, make it clear where their physical boundary is at the event and insist that the area they occupy is kept clean and rubbish is taken away at the end of the day to save on refuse collection charges. In order to maximise success, locate traders in a visible spot that is close to the main event without compromising on safety or aesthetics.



### TOP TIPS

If agreement is made with any trader on a 'fixed fee' basis, ensure that fees are paid in full before the traders have entered the venue/site and before the event commences. Do not allow any trader to leave the site until they have paid.

## Advertising

If your event has a printed programme, advertising space could be offered to local or relevant companies, or to those who have showed an interest during the sponsorship

drive, etc. Other advertising opportunities could include the sale of banner positions at the event and/or on the event website. If you have sponsors, ensure that no competing companies are advertising in your publications unless you have the agreement of your sponsor. If you have a commercial sponsor, it may also have sister brands that may be interested in taking advertising with you.

## **In-Kind Sponsorship**

Although no money changes hands with 'in-kind' sponsorship, don't underestimate its value. An in-kind sponsor provides products or services in exchange for tangible benefits (such as product awareness opportunities, event tickets, future contract guarantees, etc). Often media sponsorship is an in-kind agreement. As with Cash Sponsorship, make sure you have a written agreement as a sudden withdrawal of in-kind help may have a major impact on the event budget.

## **Licensing & Broadcasting Rights**

Your event may be attractive to media broadcasters (TV, radio), particularly if it features high profile acts or is a unique sporting event. If you do manage to attract this kind of interest it is likely that assistance will be in-kind by way of broadcast value. In general it's rare to be able to attract fees for broadcasting rights or licensing for events.

## **Other Activities**

This is where you have to be particularly inventive. Whatever the activity – attracting private benefactors or patrons, running 'friends' schemes', raffles, fundraising dinners, etc – make sure it is in keeping with the nature of the overall event and the activity doesn't end up costing you money.

## **How Long Does the Fundraising Process Take?**

Very few events are lucky enough to identify and achieve funds in a short space of time and so you should leave as much time as you possibly can. Commercial companies usually set their sponsorship and marketing budgets once a year and not necessarily at the start of the financial year in April. These budgets are often allocated very quickly and so timing is important. Raising funds from the public sector can also take some time as deadlines for funding applications are often fixed and available perhaps only once or

twice a year. After the application has been submitted, the assessment period may be a number of weeks. Additional supporting information may be required and this can cause further delays. Creating a revenue plan should help focus your fundraising activity.

### REVENUE PLAN TEMPLATE

Create a template with the following headings.

FIGURE 5.1

Funding Source	Potential Amount	Action	Deadline(s)	Fundraiser	Status	Contingency/What if...

- ▶ **Funding Source** – who you intend to target? Note, if you are applying to one body for different funds, detail each fund separately
- ▶ **Potential Amount** – how much you hope to achieve?
- ▶ **Action** – detail what you need to do in order to apply, e.g. complete application/ proposal writing, provide evidence of support, etc
- ▶ **Deadline(s)** – when the application has to be submitted, when it will be considered, when decisions will be made
- ▶ **Fundraiser** – the person responsible for approaching funders/application writing/presenting, etc.
- ▶ **Status** – if the funding is confirmed or unconfirmed
- ▶ **Contingency/What if...** – what happens if funding is not achieved from that source, what action has to be taken?

## RAISING COMMERCIAL SPONSORSHIP

In the instance an event is 'sponsored', a transaction takes place whereby a company 'buys into' the event with cash or in-kind support in exchange for particular benefits that will assist the sponsoring company in meeting certain objectives. A company will assess a proposal based on the target audience (profile and number), the content and quality of the event, the benefits to the company and cost. Before you identify companies to target, decide what you can offer potential sponsors. Ask yourself:

- ▶ Is there enough time to instigate a commercial sponsorship drive?
- ▶ Can sponsors be adequately serviced and supported?
- ▶ What is appealing about the event programme?
- ▶ What is the audience profile?
- ▶ Which products and services might the audience use?
- ▶ Which companies supply these products and services?
- ▶ Could more than one element of the event be sponsored by different companies – local, regional and national basis?
- ▶ What time period can the sponsorship(s) be offered for (e.g. a one, two or three year period)?
- ▶ What benefits could be offered?
- ▶ How will you cost the sponsorship?
- ▶ Does this represent value for money?
- ▶ Are there any ethical considerations?
- ▶ Are there any conflicts with other funding parties or stakeholders?
- ▶ Is it worth it to you?

In answering all of these questions fully and truthfully you will have formulated what you have to offer a sponsor. This understanding will help you focus on who you want to target, what you can offer and what you may potentially gain. Supporting a sponsor takes time, dedication, patience and attention to detail – it's not a question of taking the money and sticking their logo on your publicity material. Before you start approaching companies be certain that you will be able to fully commit to a sponsor in terms of time, benefits, expectations and assurances.

## What Do Sponsors Look For?

Companies enter into sponsorship agreements for many reasons. These may include:

- ▶ Direct access to specific markets
- ▶ Brand/product/service awareness
- ▶ Image creation
- ▶ Product introduction
- ▶ Identification with specific lifestyles or socio-economic groups
- ▶ Product sales
- ▶ Community relations

You will be closer to achieving your sponsorship aims if: you share target audiences; are able to provide benefits that meet the potential sponsor's objectives; and the proposal is value for money. Your potential sponsor will want to see a package of available benefits. These may include:

- ▶ **Title Sponsorship** – naming rights to the event (*i.e.* Baxters Loch Ness Marathon & Festival of Running).
- ▶ **Exclusivity** – a guarantee that they will be the sole sponsor or the only sponsor from their particular market sector.
- ▶ **Brand Exposure** – presence on all event literature, signage, merchandising, website, etc.
- ▶ **Branding** – banners, signage and display boards, etc at the event. Remember that the creation of branding materials can be expensive. Your sponsor may be willing to pay for this element or they may already have existing materials. At the start, set out what you are prepared to pay for and what the sponsor has the opportunity to provide, and present it all in an agreed branding plan or schedule. For televised events, the opportunity for exposure is a major benefit.
- ▶ **Media Exposure** – opportunity to host/comment at press launch, placement of specific articles in press (a media sponsor may be able to guarantee coverage for other sponsors), mention in all press releases, etc.
- ▶ **Advertising** – logos/mentions on paid-for advertising, advertising in event programme/publications, etc.
- ▶ **Merchandising Rights** – opportunity to sell their product.
- ▶ **Sampling Opportunities** – opportunity to give away samples of their product.
- ▶ **Tickets and Merchandise** – agree the level of complimentary (or discounted) tickets and merchandise available. It is likely that sponsors will want to invite staff and clients.
- ▶ **Networking Opportunities** – at the event and at any pre or post event business or hospitality opportunities.
- ▶ **Long-term Relations** – the opportunity to secure a 3–5 year relationship.
- ▶ **Hospitality Opportunities** – exclusive sponsor's party or corporate box/pavilion for their clients, staff, etc.
- ▶ **Product Creation** – the opportunity to provide a branded product, gimmick, toy, etc exclusively for the event.
- ▶ **Additional literature** – the opportunity to distribute additional event or company literature.

If you have more than one sponsor, ensure that the key sponsor – generally the one investing the most money – receives the most benefits.

## Working out a Value

This is often a haphazard guessing exercise which can result in the price starting too high to attract interest. If you take this route, you risk devaluing the product if later you have to reduce the price. An opportunity is only worth what someone is willing to pay, but you should do your homework and research similar sponsorships and their value. Seek advice from Arts & Business, speak to fundraising professionals, keep abreast of the daily financial pages, etc. Also, list all the direct costs associated with the delivery of the benefits and the support on offer. This will help you avoid costing the sponsorship package too low. Some of your related costs may include:

- ▶ Fundraiser fees/wages/commission
- ▶ Sponsor's ticket and merchandise value
- ▶ Hospitality costs – food, drink, venue/marquee hire, etc
- ▶ Printing and design costs of any additional literature
- ▶ Production of sponsor's signage and banners
- ▶ Erection/installation charges for signage and banners
- ▶ Additional advertising costs
- ▶ Administration expenses
- ▶ Additional staff time to support the sponsor – marketing, production, financial manager, etc
- ▶ Legal costs (*i.e.* if you need advice with regards to the contract)
- ▶ Additional press clippings/media monitoring services
- ▶ Any other direct costs

After you have undertaken this exercise, ask yourself what the net benefit will be to the project *i.e.* 'is it worth it?'

## Approaching Sponsors

In developing your Sponsorship Plan, you will have undertaken an amount of research. You will have identified compatible sponsors – *i.e.* those companies whose products or services best suit the event and appeal to the event audience. You may wish to categorise these companies into appropriate sectors such as: Food and Drink, Health & Fitness, Legal & Accounting, Media, Manufacturing, IT, etc and target one sector at a time or one company from each sector before moving on to the next. Regardless,

before you approach anyone you will need to understand what benefits they may require and what their expectations might be – each company will be different. Look at company websites and literature, the financial press, etc to gain some insight. Some companies have specific criteria for sponsorship seekers and they will happily send this information out if you ask.

You should tailor your proposal to each company based on your research. If you don't know already, try to identify the right person to whom the proposal should be sent. Some companies have specific Sponsorship Managers, others facilitate it via their Marketing Departments, Brand Managers or through an agency working on their behalf. Make contact with the Manager, preferably by phone in the first instance, and forward the Sponsorship Proposal by post or email if interest is shown. Follow this up with a polite phone call a week or so later if you haven't heard back. By now you should have an idea whether the company is interested or not. It is a good idea to keep a database of all the people you contact and their state of interest. This will provide a resource for future years and future events.

## **The Sponsorship Proposal**

This document should be well written with no spelling mistakes or typos. It should be laid out in a professional manner using a clear font with good spacing. Keep it concise, easy to read and no more than five pages in length. It is one of the first impressions that your company and your event will be judged on so make it a good one. Below is a guide for a Proposal to start you off. Adapt this for your particular event and each individual company that you target. Some companies may have specific guidelines to follow. If this is the case, go with their required format when writing the proposal.

SPONSORSHIP PROPOSAL GUIDE	
<b>Cover Page</b>	
	▶ Prepare an eye catching cover page with your event logo/visuals, your contact details and a short summary of the key benefits on offer to the sponsor.
<b>Contents</b>	
	▶ Create a contents page to ensure the proposal is easy to navigate
<b>1.</b>	<b>The Event</b>
	▶ <b>The Event</b> – give an overview of the event and its background. Include a couple of good press quotes and images if you have them
	▶ <b>The Audience</b> – state the audience profile and predicted attendance levels
<b>2.</b>	<b>The Organisers &amp; The Partners</b>
	▶ <b>The Organisers</b> – tell them a bit about you and your experience
	▶ <b>The Partners</b> – tell them about any funding partners that are on board such as the local council, national agencies, etc
<b>3.</b>	<b>The Opportunity</b>
	▶ <b>Introduction</b> – detail the opportunity or opportunities that are available to them
	▶ <b>Value</b> – tell them how much it will cost
	▶ <b>Usage</b> – say how the sponsorship funds will be used
<b>4.</b>	<b>The Benefits &amp; Entitlements</b>
	▶ <b>Benefits</b> – outline the package of benefits they will receive in return for their support including the amounts and types of marketing materials (it may be a good idea to include an overview of the event's Marketing Plan and tools)
	▶ <b>Entitlements</b> – state clearly what they will be entitled to do in support of the sponsorship
	▶ <b>Additional Benefits</b> – list any additional benefits that they could take advantage of for a further price
<b>5.</b>	<b>Contact Details</b>
	▶ Make sure your details are on the final page of the document as well as the cover page

## Follow-up

If a sponsor is interested in your initial proposal, be prepared to go to meet them to talk about the opportunity in more detail. Take along support material (perhaps a laptop slideshow or promotional film) that illustrates your vision and strengthens your pitch – pictures can often speak louder than words when trying to describe and communicate the event experience and opportunities.



## Confirmation

When sponsorship – whether cash or in-kind – has been offered, prepare a written agreement for both parties to sign. Include what you expect to receive, when you expect to receive it, what the sponsor will receive in return and when they will receive it. Confirm which logos or brand identity will be used in any marketing materials and how/where they will be used. Make sure you build time into your print schedule to facilitate the sponsor's approval of their logo placement and any other acknowledgement on the various marketing materials.

## On-going Relations

Your relationship with your sponsor may be one of the most demanding that you will be involved in when it comes to the event. A good working relationship will help both parties maximise their benefits. This will be based on trust and performance. Be truthful with your sponsor at all times and if a situation arises where you cannot provide a particular benefit, make sure to let them know and, if appropriate, invite them to help you work out a solution which could result in you providing an alternative benefit. A monitoring system with regular reports and meetings will help keep them involved at all stages, assist with mutual trust and hopefully maintain their future interest. Remember; provide a single point of contact to liaise with the sponsor and to ensure smooth communication.

## Maximising the Benefits

When your sponsorship is agreed, remember to keep switched on to any potential additional benefits the relationship may bring to the event. For example, your sponsor may have a large staff or client base and may communicate with them via publications, e-bulletins, press events, etc. It's worth discussing with your sponsor mutually beneficial ways to reach this audience (*i.e.* special ticket offers, competitions, etc).

## Branding Plan

For larger events with a wide range of branding options, it's a good approach to produce a 'branding plan'. This is basically a plan that shows the locations and specifications of all your sponsor's branding. Sponsors generally want to be very visible at the event and

prior agreement of branding designs, positioning and sizes is essential if you want to keep your sponsor on board. Ensure you clarify what opportunities are provided as part of the sponsorship package and who is paying for what (never spring an unexpected branding production or erection bill on your sponsor). It's good practice to arrange a 'site walk' with your sponsor(s) prior to the event opening – this will ensure that they are happy with their branding and allow any last minute adjustments before the event begins.

## Evaluation

It is important to prepare a comprehensive report for your sponsors after the event. If you have or are looking to achieve an on-going commitment with them it will help to strengthen ties for the future. It will also benefit both parties when preparing further reports on marketing and sponsorship activity. The report should include:

- ▶ A letter of thanks and appreciation
- ▶ A review of the event's success and the attendance
- ▶ How the sponsorship contributed to this success
- ▶ A report against agreed outcomes/targets
- ▶ A reminder of the benefits that the sponsor received
- ▶ Key press cuttings and other publicity that mention the sponsor
- ▶ Copies of all event literature that featured the sponsor's name and logo
- ▶ Photographs of the event, particularly those that show sponsors' branding in-situ

## The Tendering Process

In order to ensure best price and best value, you may wish (or be required) to 'put to tender' some elements of the event that need to be supplied by third parties. These may include:

- ▶ Catering, funfair or other concessions (where a company pays the event in order to be part of it)
- ▶ Production supplies, e.g. generators, sanitary facilities, etc (where you pay a supplier for goods or services)

Either way, the tendering process is much the same.

## Step 1

You may wish to issue an **Invitation to Tender (ITT)**. This sets out what you require to be supplied. Give details of the event such as dates, times, scope, etc and a description of the amount and type of goods or services you require. Send this to relevant companies and invite them to reply to you by a certain date stating whether they wish to be sent a Tender Document. This is called an **Expression of Interest (EOI)**. Receiving EOIs is useful as it lets you know in advance the number of tenders you are likely to receive.

**Note** – if you have had personal contact with a number of companies or do not have time to undertake Step 1, go straight to Step 2.

## Step 2

Send the **Tender Document** to those who have returned an expression of interest. This is a detailed document with all relevant information on which the supplier will base their tender. You should include:

- ▶ **Timescale and Return Details** – state clearly by which date and time the tender must be returned, in which format, number of copies (if more than one evaluator) and the return address and contact details.
- ▶ **Project Description** – details on the event, date, timings, nature, audience profile, etc.
- ▶ **Statement of Requirements** – specify what it is you are looking for. If you are not sure exactly what will be required and are asking for companies to professionally advise you on what you will need, provide all relevant data upon which they can base their recommendations. The more information you can give at this stage, the more time you may save answering questions later.
- ▶ **Evaluation Criteria** – you may wish to evaluate submissions based on a number of factors and not just the bid/cost amount. In this case, weight these elements in order of importance. For instance, the criteria you use may be:
  - ▶ Bid/Cost 50%
  - ▶ Approach & Equipment 20%
  - ▶ History & Credentials 20%
  - ▶ Added Value 10%

- ▶ **Terms & Conditions** – include all Terms & Conditions you require the supplier to adhere to such as provision of services, delivery dates, non-collusion (it is important that each company agrees that they will not collude with any other company taking part in the tendering process), confidentiality, data protection, liability, indemnity & insurance, termination details, VAT liability, etc. Ask for their agreement to the Terms & Conditions by signing the appropriate box on the return submission.
- ▶ **Tenderer's Submission Document** – provide a document (ideally electronically) for each supplier to fill out and return in response to your tender document. Base your template on the Evaluation Criteria you previously set out. For the above criteria, your Tender Submission Document may look something like this:

FIGURE 5.3

<b>Tender Submission Document Template</b>	
For Supply of XXXX to XXXXX	
Name of Tenderer	
<b>Key Contact</b>	
Address:	
Tel:	Fax:
Email:	www:
<b>Contact Name</b> (one name only)	
<b>History &amp; Credentials</b>	
Briefly state your company history and provide evidence of previous work similar to that set out in the Project Description and Statement of Requirements:	
<b>Approach &amp; Equipment</b>	
Provide a methodology for the provision of services set out in the Statement of Requirements and give details of the equipment/service you are offering:	
<b>Added Value</b>	
State how you can add value to services/goods you are providing, e.g. additional services, flexibility, etc:	

Bid/Cost	
(Provide your own notes for the tenderer here – lay this section out depending on what you are asking. If you are asking for multiple goods or services, provide a breakdown for the supplier to fill in. If you are VAT registered, ask for the bid/cost exclusive of VAT and, if not, ask for it inclusive of VAT. State any financial requirements in the Terms & Conditions)	
Agreement to Terms & Conditions	
I [insert name] agree to all Terms & Conditions set out within the tender document	
Name _____	Signature _____
Date _____	

### Step 3

The next step in the process is to **Evaluate**. The fairest and most impartial way of evaluating is to create a scoring system based on the Evaluation Criteria you have already set out. Show the scores on an easy-to-read table. Your table might look something like this:

FIGURE 5.4

Tender Evaluation Table Template					
Name of Tender					
Evaluation Criteria	Company 1 Insert Name	Company 2 Insert Name	Company 3 Insert Name	Company 4 Insert Name	Company 5 Insert Name
Bid/Cost	Score out of 50				
Approach & Equipment	Score out of 20				
History & Credentials	Score out of 20				
Added Value	Score out of 10				
Total Scores	Total / 100				

By using this system, the highest score would win the contract as, in theory, it provides best value.

### Step 4

The final step is to notify all tenderers of your decision and to issue a contract to the successful supplier based on the Terms & Conditions set out in the Tender Document.



chapter six

# the programme



## Events take many different forms but are likely to fall into one of these broad categories:

- ▶ **Sporting**
- ▶ **Arts & Culture**
- ▶ **Heritage**
- ▶ **Lifestyle & Leisure**
- ▶ **Industry/Business**
- ▶ **Awards/Competitions**

Regardless of event type, a strong event programme is essential for success. If the programme is insubstantial or of poor quality it will not live up to the expectations of the audience/participants.

When deciding on the elements that will make up the programme, consider the following questions. Your answers will provide a solid base from which to start forming the programme or building around critical elements already in place:

- ▶ What are the event's vision and mission?
- ▶ What are the event objectives?
- ▶ What are the essential programme elements?
- ▶ What elements could support or enhance the core programme?
- ▶ What is the theme of the event?
- ▶ What standards of quality apply?
- ▶ Who is the event aimed at?
- ▶ How many are expected to attend?
- ▶ What are their expectations?
- ▶ When and where will it take place?
- ▶ How long will it last?
- ▶ Have there been past successes or failures?
- ▶ What is the programming budget?
- ▶ How will you maintain interest and keep it fresh?

Every event is different and a publication such as this is not designed to give specific advice in terms of the quality and development of your programme. If you require advice in relation to your programme you should seek it from the appropriate bodies or individuals that are relevant to your particular interests. However, in general terms it may be useful to think of an event programme as made up of component parts:

- ▶ **Main entertainment/event focus** – in line with the theme of the event, the main entertainment or event focus is what attracts the audience
- ▶ **Secondary entertainment/focus** – often a similar type of entertainment or activity to the main attraction or a different type that appeals to the core audience
- ▶ **Support entertainment/activities** – usually a different type of entertainment or activity to the main attraction that still appeals to the audience and fits with the theme
- ▶ **Ancillary activities** – additional fillers or things for the audience to do during the event or at scheduled intervals

Aside from the above, certain events will have key essential elements as part of their programme e.g. opening events or previews, medal presentations, closing ceremonies, etc.

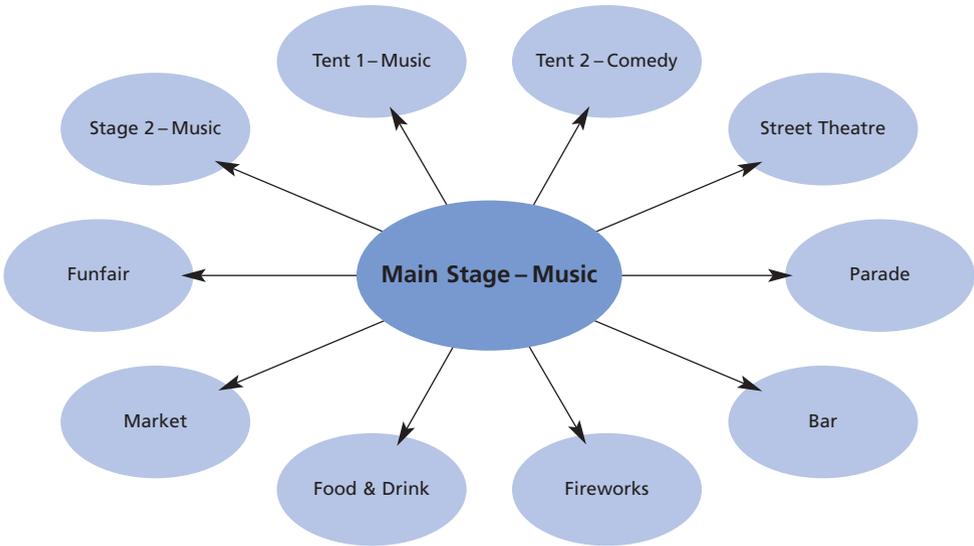
To help you focus on different elements that make up your event programme, we have illustrated a couple of models (opposite) that could apply to:

**1) A mid-scale multi-arts festival**

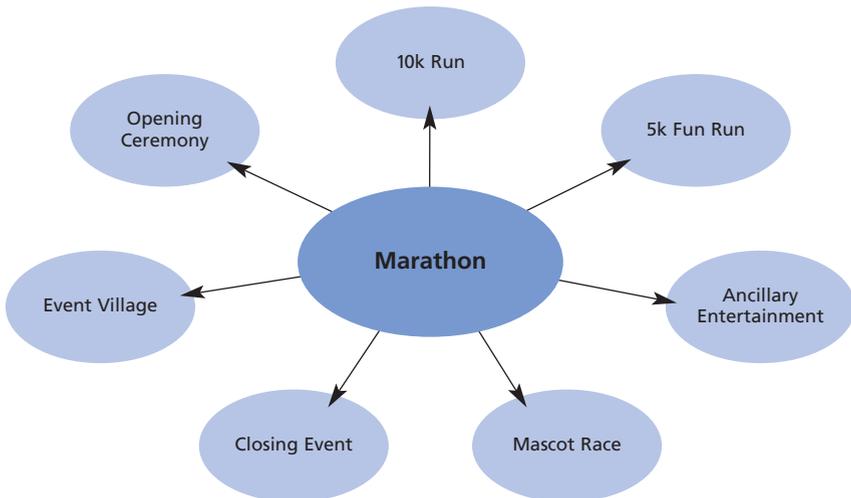
**2) An athletics/running festival**

Once you've established the different programme components that you'll require, you can focus on the specific acts/shows/features, etc that would be appropriate for the event. Remember, a strong programme content and structure are essential to the success of the event.

## 1) A mid-scale multi-arts festival FIGURE 6.1



## 2) An athletics/running festival FIGURE 6.2



## Timing the Programmed Activity

It's crucial that your programme is timed so that each element works with the whole. The considerations below will help you determine how much content you require and when to schedule particular entertainment or activities:

- ▶ Does the event require a clear beginning, middle and end?
- ▶ How long will each programme element last?
- ▶ How much time is required between elements?
- ▶ Will people have enough time to get from one programme element to another?
- ▶ Are you providing enough of a programme to sustain the audience's interest?
- ▶ If the same act/competitor performs more than once, make sure there is enough time to rest or relocate between performances/competitions
- ▶ Does the event need a march, parade or opening ceremony to draw people into the venue or to mark its start?
- ▶ Should the entertainment be competitive – *i.e.* should different elements take place at the same time or would this be detrimental to the main purpose of the event?
- ▶ Are intervals a necessity and, if so, is entertainment required during the intervals?
- ▶ Is audience/participant retention required at particular times (think about patterns of attendance, expected quiet times, intervals, etc and programme accordingly)?
- ▶ Do particular audience/participant groups require special consideration (e.g. children)?
- ▶ Is time required for audience/participant and/or equipment relocation?
- ▶ Have you provided areas where people can relax, eat or drink in between programme elements in which they are taking part?

When programming shows, acts or entertainers always try to see the work for yourself before making a booking. Failing that, ask to see showreels, photographs and always ask for references. Don't forget to visit other festivals and events throughout the year – perhaps you could adapt or pick up an idea to fit your event. Build a database of potential acts – a handy resource for the future.





chapter seven  
**legal issues**



**Understanding your responsibilities under law is an essential part of effective event management. Organising an event involves taking care of a variety of legal issues. At the outset you need to define the legal responsibilities associated with running your particular event, and if they can be delivered within the available timescales.**

This section does not aim to provide specific legal advice. It is meant as an initial guide to prompt your thinking and action. You need to be aware of potential liabilities and we suggest that you take legal advice as appropriate.

Areas you should consider as a minimum include:

- ▶ Organisational Structure and Legal Status
- ▶ Event Ownership
- ▶ Contracts & Agreements
- ▶ Licences and Permissions
- ▶ Disability Issues
- ▶ Equal Opportunities
- ▶ Data Protection
- ▶ Insurance (see Chapter 8)

## **Organisational Structure and Legal Status**

Events are delivered through a variety of organisational structures, each with different legal status. Below are listed a few of the available options:

### **Unincorporated Association**

Setting up this kind of organisation is relatively straightforward. It usually involves an arrangement between members whereby a committee is formed and the organisation

is run under a simple constitution (see below). Events operated by community groups or sports and arts associations often operate in this way. However, as the organisation does not have any separate legal identity from its members it is worth bearing in mind the potential pitfalls when organising events through this model. For example, the committee members have unlimited joint personal liability for any debts or actions that the organisation may have raised against it. This could threaten members' personal assets should something go badly wrong with the event. These kinds of organisations often find it difficult to attract active and committed membership which can generate a sense of insecurity. For all of the above reasons unincorporated associations may find it more difficult to attract funding from third parties. This kind of organisation should only deliver events involving a very limited risk.

**The Constitution:** To provide clarity of purpose and direction it is advisable that unincorporated organisations draw up an agreed written constitution outlining what the organisation does and how it is managed. This can be a relatively simple statement of purpose, written in plain English and covering the following areas:

- ▶ The name the organisation trades under
- ▶ The aims of the organisation
- ▶ The means by which these aims can be achieved
- ▶ Eligibility for membership
- ▶ Committee selection and period of service
- ▶ Procedure for resignation and expulsion of members
- ▶ Office bearers' functions and duties
- ▶ Procedures for financial management
- ▶ Timing of meetings
- ▶ Procedure if things go wrong or if the organisation ceases to operate

## Sole Trader

This is a business run by one individual for their personal interest or benefit. It is very simple to start trading in this way. You can set up a bank account in your name or you can 'trade as' the name of the event. Be aware that any debts and liabilities will be yours alone and you may also find it difficult to raise public funds.

## Parent Organisation

Some events are run through an existing, larger organisation. The members of the parent organisation take on the responsibility for the event with no need to set up a new, independent organisation. In this kind of scenario it is recommended that a separate accounts 'department' is created for the recording of financial activity associated with the event. This is in order that the income and expenditure specifically related to that event can be shown independently of the parent organisation's accounts. If applying for public funding for the event, this is usually required for reasons of transparency.

## Limited Company

If your event involves reasonable financial risks, it may be appropriate to set up a Limited Company. This kind of organisation has a separate legal identity from its members and can, for example, receive money, enter into contracts and be sued in its own right. A limited company has named directors whose financial liability is either limited by guarantee (usually a nominal sum of £1) or by shares (the level of share capital committed by the directors). Setting up this kind of organisation involves additional costs and time in order to comply with Company Law (e.g. formal annual accounts, company returns, etc) but it is likely to be worth it if yours is an event of reasonable size. Companies are registered through Companies House. To register you must submit your constitution in the form of a Memorandum and Articles of Association, supply details of directors, company secretary and members and have a registered office. Although it is advised that you seek the advice of a lawyer and accountant when setting up your company, it is not always essential. For information on how to form a company visit [www.companieshouse.gov.uk](http://www.companieshouse.gov.uk)

## Charitable Status

Organisations with charitable purposes can apply for charitable status. Benefits include tax advantages and the ability to receive donations from charitable trusts. Although there is no cut and dried definition of what defines a charitable purpose under Scots Law, organisations whose activities deliver a clear educational or social benefit to the public may qualify. For information on seeking charitable status visit [www.inlandrevenue.gov.uk/charities](http://www.inlandrevenue.gov.uk/charities) and [www.oscr.org.uk](http://www.oscr.org.uk) (The Office of the Scottish Charity Regulator).

## Event Ownership

At the outset you must establish who actually owns the event and therefore has the various rights and liabilities associated with it. Clarify if you have the right to enter into any contracts with third parties on behalf of the event. Please note, EventScotland and other funders are unlikely to enter into a funding relationship with anyone other than the event owner.

## Sanctioning

In some cases it may be necessary to receive formal or legal permission from a governing or nominated sanctioning body of a given sport or activity in order to host or manage an event. This permission may be termed 'sanctioning' and it is usually required for any national and international sporting event that is held under specific international rules.

The purpose of sanctioning an event is to ensure that it is delivered to a standard agreed with the governing body. In return for sanctioning the event is usually required to provide financial return to the sanctioning body – either a lump sum and/or a **capitation** fee.

Sanction provides the legal authority to run/host an event. It may also provide additional benefits to the event organiser such as access to:

- ▶ Public liability insurance cover
- ▶ Use of Internationally recognised logos
- ▶ Marketing support *i.e.* inclusion of your event in calendars
- ▶ Qualified officials and volunteers
- ▶ Sport specific expertise

If you are considering organising a sporting event it is advisable to contact the national governing body for that particular sport. An up-to-date list of these is available from **sportscotland** [www.sportscotland.org.uk](http://www.sportscotland.org.uk)

## Copyright

If you are commissioning any creative work as part of the event, for example a new show, photography, print design, website, etc ensure that you agree in writing the rights to any future use. UK Copyright Legislation sets out various rules for determining the author of any type of copyright work. Generally the person with copyright is the person who creates the work, but it is not always straightforward. If you are intending to reproduce in any form a copyright work, make sure you get proper clearance. For guidance visit [www.ipsi.gov.uk](http://www.ipsi.gov.uk) or [www.businesslink.gov.uk](http://www.businesslink.gov.uk)

## Contracts & Agreements

Organising an event involves making a whole range of agreements with a number of organisations and individuals including funders, sponsors, venues, suppliers, performers, staff and volunteers. It is essential that you put all agreements in writing thus ensuring that each party understands exactly what is expected of them. The agreements you make are likely to range from quite substantial formal contracts between the key event partners to purchase orders with suppliers.

### Agreements with Key Partners

At the outset establish who the key partners are and what they expect from their involvement in the event. Ensure that you have a written contract with each outlining what is to be delivered on both sides. If your event is publicly funded, it is likely that funding bodies will issue you with their standard contract tailored towards the event. Ensure that you read and understand all contracts fully before signing. Non fulfilment of the terms of a contract is likely to result in withdrawal or non-payment of funds.

### Issuing Your Own Contracts

Not everyone will issue you with a contract. You may require to issue your own on behalf of the organisation, for example to engage performers or confirm sponsorships. Don't be scared off by the term 'contract'. A contract is simply a written agreement that both parties sign. The scope of this guide cannot offer specific legal advice and our guidance should not be taken as such, however bear the following in mind when formalising any agreements:

- ▶ Keep it simple, there is no need to write in legalese
- ▶ Always include the full contact details of both parties and name a representative for each
- ▶ Ensure that the signatories have the power to sign on behalf of their respective organisations
- ▶ Date the contract and state a return date as appropriate
- ▶ Include full and clear details of what you expect to receive
- ▶ Include full details of what you will provide
- ▶ Include specific detail of the financial agreement and remember to be clear if VAT is included
- ▶ If you are dealing with a foreign company, be clear under which country's law the contract is drawn up and the rate of exchange applied to the fee.
- ▶ Include a statement about what happens in the event of cancellation or if either party is unable to deliver to the agreement
- ▶ Include a statement about any insurance requirements
- ▶ At the end provide a section that allows each party to print their name, provide a signature and date their agreement
- ▶ Send two signed copies to the other party in order that one can be returned signed by them
- ▶ Ensure you keep copies on your computer as well as a hard copy in a 'Contracts' file

Finally, always ask a lawyer (perhaps there is one on your committee or board) to have a look at any documents that you are unsure about. Where a significant amount of risk is involved always seek legal advice.

## Quotes and Purchase Orders

Of course, you will not draw up or receive a contract for every agreement that you enter into. When ordering supplies or services ensure that you always receive a written quote before going ahead. It's good practice to send a purchase order to confirm your acceptance of a quote, making sure that you include any delivery or additional instructions as appropriate. Keep all your quotes and orders on file for easy reference.

## Licences and Permissions

It is likely that you, the venue, concessionaires and subcontractors, etc will need to have certain licences or permissions in place before the event can be held. Many licenses



are issued by local authorities, so it's best to take their advice early in the planning stages of your event. Appropriate licences may include:

- ▶ **Public Entertainment Licence** – this is usually issued by the local authority for all buildings and locations in the open air at which entertainment is provided to the public. A licence can be issued either for one or more occasions (an Occasional or Temporary Licence) or for a period of one year (an Annual Licence). The main purpose of licensing entertainments is to enable the local authority to ensure the health, safety and welfare of members of the public. Licences are therefore only granted when the premises (or site) and arrangements meet the standards required by the Police, Fire Service, and the relevant council departments.
- ▶ **Street Trader's Licence** – usually required when the sale of goods is in operation, or where food or hot/cold beverages are sold. Issued by the local authority.
- ▶ **Temporary Market Trader's Licence** – similar to the above, but when your event basically constitutes the operation of a market – *i.e.* an art, craft or food fair. Issued by the local authority.
- ▶ **Alcohol Sales** – your event venue/site may have an existing licence or you may be able to negotiate a deal with a licensee to supply a bar. If neither applies, you should investigate if you are able to apply to the local authority for an Occasional Licence.
- ▶ **Building Control & Temporary Structures Licence (Section 89)** – if you are considering converting the use of a building, erecting scaffolding, staging, etc, you will require the assistance of the relevant local authority department and may perhaps require temporary licences such as a Temporary Structures Licence (especially if you intend to build any temporary structures over 600mm).
- ▶ **Land Bond** – the owner of the land on which you stage the event may require a monetary bond to be lodged before you take temporary possession of the land. This bond may be returnable if the owner has incurred no expense in order to reinstate the site to its original state. Even if you aren't required to lodge a bond, ensure that you obtain the written consent of the land owner to proceed with the event on their property.

- ▶ **Planning Permissions** – if certain types of construction are required, sculptures/statues erected, trees planted, etc you are likely to require planning permission from the relevant local authority department.
- ▶ **Road Use and Closures** – if the event requires special road access or road closures for elements such as a road race, parade or a street party, you will need permission from the local authority. The Emergency Services will also be involved in any decisions to close a road.
- ▶ **Environmental & Hygiene Factors** – the relevant local authority department will also be able to advise you on food safety, noise pollution levels, consumer rights and trading issues, clean-up and rubbish up-lift, etc.
- ▶ **Performing Right Society** – when music is played in public the owner of the copyright is entitled, by law, to payment from the music user. The Performing Right Society is an organisation that collects and distributes this money (known as ‘royalties’) to its members – the copyright owners (usually the composer or their publisher). A PRS licence is required for the live performance or public playing of copyright music by any means. This includes jukeboxes, CDs, video, radio, TV or live bands and discos. Contact the PRS on: 0800 068 48 28 or visit [www.prs.co.uk](http://www.prs.co.uk) for advice.

Note that charges may be applicable for some or all of the elements listed above and these should be factored into the event budget and planning at an early stage. Each licensing authority is likely to have its own procedures and rules – make sure you are familiar with those that apply to your event and area.

When you apply for your relevant licence(s), it is likely that you will have to include details of your event operations including an accurate site plan. These will be circulated to the relevant licensing authorities for their advice and feedback. Representatives from various departments (*i.e.* environmental health and building control) may contact you to extract further detail or clarify information. Although operating licences may be granted in principle prior to an event, it is usual that events only receive their final license inspection (and licence) just prior to the public opening.

The Scottish Outdoor Access Code gives detailed guidance on your responsibilities when exercising access rights to land and inland waters. More info is available at [www.outdooraccess-scotland.com](http://www.outdooraccess-scotland.com)

## Disability Issues

There are two Acts of Parliament which introduce and provide a means of enforcing rights preventing discrimination against disabled people: The Disability Discrimination Act 1995 ([www.legislation.hmso.gov.uk/acts/acts1995/1995050.htm](http://www.legislation.hmso.gov.uk/acts/acts1995/1995050.htm)) and The Disability Rights Commission Act 1999 ([www.legislation.hmso.gov.uk/acts/acts1999/19990017.htm](http://www.legislation.hmso.gov.uk/acts/acts1999/19990017.htm)). When planning your event, ensure that you are abreast of the requirements regarding disabled access. Event organisers could face legal challenges from disabled people unable to access an event. Making events accessible for disabled people is not just a legal requirement however. With around 10 million disabled people in the UK and a combined spending power of £50 billion each year it is an important commercial decision too. The Disability Rights Commission recently published a useful guide aimed at events organisers entitled 'Organising Accessible Events'. This is available to download at [www.drc-gb.org](http://www.drc-gb.org). More information is also available at [www.disability.gov.uk](http://www.disability.gov.uk)

## Equal Opportunities

If your organisation is employing staff you must be aware of equal opportunity legislation. Regardless of race or ethnicity, disability, gender or sexual orientation, age or religion, legislation is continually being introduced and developed which improves equal opportunities for all. Visit [www.eoc.org.uk](http://www.eoc.org.uk) for up-to-date information.

## Data Protection

The Data Protection Act 1998 regulates the processing of personal information, *i.e.* data about living people who can be identified from that information. The Act covers data such as mailing lists and records on staff. It applies to information you hold on a computer and to some paper-based records. For more information visit [www.opsi.gov.uk](http://www.opsi.gov.uk) or [www.businesslink.gov.uk](http://www.businesslink.gov.uk)

## Child Protection

Any event staff involved with looking after children should have the appropriate approval from Disclosure Scotland. For more information visit [www.disclosurescotland.co.uk](http://www.disclosurescotland.co.uk). Additional information at [www.children1st.org.uk](http://www.children1st.org.uk)



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chapter eight  
**insurance**



**Organising the appropriate insurance for your event is essential. Attention to detail is of utmost importance when putting in place the cover that is required. In taking out insurance, the insurer/underwriter agrees to provide security against future loss, damage or liability in return for a non-refundable premium paid by the event.**

A 'broker' will arrange insurance on your behalf. It is their job to find the best deal for you from the various appropriate underwriters in the marketplace. It is likely to be counter productive to ask a range of brokers to find you the best quote as each may present your case differently (bringing issues of misinterpretation) to the limited range of underwriters available. This tends to cause the underwriter frustration and concern.

- ▶ We recommend you select and build a relationship with an insurance broker that you think understands the events industry and your concerns in particular. This will ensure that you achieve the most relevant policy at the best price.
- ▶ Savings can be made when a standard policy is shaped to meet your actual needs – for example, a policy you already have may cover elements offered in the event policy or some of the standard policy exclusions may not apply to you.
- ▶ The more the broker (and hence the underwriter) understands about your event the more effective and affordable your policy is likely to be. Make contact with your broker well in advance of the event so that you can provide the kind of information required within the relevant timeframes.
- ▶ Aim to confirm your insurance around 2–3 months before the event and no later than a month before. A late approach tends to indicate poor management and (potentially) increased risk.

- ▶ Provide the broker with documents and information that communicate the professional nature of your organisation and the event – this approach could well mean savings on your premiums. Show the insurer that you understand your risk. If you do not supply detailed information the assessor is likely to base the quote on assumptions.

Here's a checklist outlining the kind of information that you should expect to submit:

- ▶ An outline of the nature of the event
- ▶ Period of insurance required (event build/live event/take-down)
- ▶ Experience of the organisers (include brief CVs of the key staff)
- ▶ The number of times the event has been held and the insurance claims record. If the event has made no insurance claims to date make sure you highlight this very clearly
- ▶ Event capacity and audience profile
- ▶ Health and Safety policy
- ▶ Emergency arrangements
- ▶ Liaison with the local authority and any joint agency health and safety sub-groups
- ▶ Information about any staff safety training and procedures
- ▶ Production schedule
- ▶ Risk assessments
- ▶ Method statements
- ▶ Details of subcontractors and their insurance
- ▶ Details of any work to be carried out at height (*i.e.* above 3m)
- ▶ Site plans
- ▶ Full list of attractions
- ▶ Details about any on-site accommodation (*i.e.* camp sites, etc)
- ▶ Information about any specialist contractors such as pyrotechnic companies
- ▶ A schedule of the event equipment that you need to insure
- ▶ A copy of any contracts that you have with funding partners, artists, competitors, sponsors, subcontractors, etc that feature insurance clauses (they all should). It may be that you, as Event Manager, have to indemnify other parties against loss, damage or liability, etc as well as yourself and the event. If the event is being funded in part or in whole by a public sector organisation it is likely that their contract with you will clearly state a level of public liability cover that must be in place. This figure will then be the minimum amount of cover you require.

When the broker has absorbed all the information they will be able to advise you on the recommended mix of insurance cover for the event, communicate your requirements to suitable underwriters and provide you the details of costs and cover available. The quotations you receive should clearly state what is covered, the underwriter's charge, what the broker is earning out of the deal and the Insurance Premium Tax (IPT). Remember to ask your broker for advice on the stability of the various underwriters as well as the likelihood of any claims to be paid – there's little point paying a low premium if the insurer has a bad pay-out record.

When you have accepted a quote and received your policies, read them carefully, making sure nothing has been omitted that you thought you were covered for. If anything changes after taking out the policy, you must notify your insurer immediately in order that they can update their records (this may involve a change to your premium).

#### **Your policy is likely to include a range of cover including:**

- ▶ **Public Liability** – this covers you against claims made by the public who attend the event. Premiums are based on many factors including the size and profile of the event, type of audience, etc. Levels of cover vary depending on your needs so it is imperative that you discuss your requirements fully with a broker. The level of cover usually required for events ranges from £2 million to £10 million.
- ▶ **Employers Liability** – if you have one, your existing office policy may cover you and your staff when you are in the office, but it may not cover you when on site during the build up/take down or the live event. It is also unlikely to cover occasional staff, crew and volunteers who work at the event. You may therefore either need to extend the existing cover to include additional personnel and time or take out another policy specific to the event. The level of cover and premium often depends on the number of staff, the payroll and duties.  
Note: ensure that all freelance staff and contractors carry their own insurance and make this a condition of your contract with them.
- ▶ **Event Equipment & Property Cover** – when you hire equipment for an event it is likely that insurance is not included in the hire charge (always check this with suppliers). Some companies offer this service based on a percentage of the hire charge, which

you can opt to take. If this service is not offered or if you choose not to take the cover with them, it is imperative you insure any hired equipment from the moment you take delivery until it is collected after the event. Also, don't assume that any equipment you take from your office to the event site is covered by your office policy. You'll need to provide a schedule of all the equipment in question and its replacement value to your broker. It's a good idea to start compiling this list from the point that you start ordering hired equipment. The premium tends to be a percentage of the total figure. Check the excess on the policy as the replacement cost of some items covered may be less than the policy excess.

- ▶ **Cancellation & Abandonment Insurance** – just like it says, this covers you for cancellation or abandonment of the event due to situations beyond your control such as flooding, inclement weather, postponement, etc. Levels of cover will depend on your particular requirements and the level of risk. Check the policy carefully for exclusions. This insurance can be very costly but it's necessary for many events, particularly those with an entry ticket charge. If you decide not to take out this cover, make sure you have a contingency plan in place should your event be cancelled.

You will need all or a combination of the above for event insurance purposes. In addition, other policies may be required such as **Professional Indemnity** or **Directors Liability**. Make sure you consider all your options carefully, check what is expected in terms of insurance by all funding partners and seek legal advice if you are unsure.

## Claims Management

Claims can be made up to three years after an incident takes place. To ensure that you are able to successfully manage any insurance claims or defend any illegitimate claims, make sure that you put a process in place to record all incidents:

- ▶ Ensure that you keep an incident book and that all staff are aware how incidents should be reported and managed
- ▶ In the event of an incident, gather key information (hard evidence) such as photographs; witness statements and contacts; details describing any equipment involved and the activity being undertaken at the time of the incident; details of any damage to property or persons; documentation relating to the injured person

such as registration forms; a statement of any medical treatment offered/accepted/refused; contact details for the injured person, etc

- ▶ Notify your insurance broker as soon as possible after an incident if you think a claim might arise
- ▶ Copy any letters of claim to your broker immediately and allow them to deal with the claim



chapter nine

**event production:  
operations, equipment,  
facilities, health & safety**



## This chapter is intended to help you start thinking about how to safely deliver your event from an operational point of view.

For further information and more detailed advice particular to your situation, we recommend you refer to the appropriate 'industry standard' guides, for example:

- ▶ **'The Event Safety Guide – A Guide to Health, Safety and Welfare at Music and Similar Events'** (The Purple Guide), HSG195, HSE Books 1999  
ISBN 0 7176 2453 6. Available from [www.hsebooks.com](http://www.hsebooks.com)
- ▶ **'Guide to Safety at Sports Grounds'** (The Green Guide) by the Department of National Heritage and the Scottish Office, the Stationery Office, 1997,  
ISBN 0-11-3000-952

The above publications are considered authoritative guides. Their information is referred to and followed by the UK events industry, local authorities and the emergency services. The Health & Safety Executive (HSE) website is also an excellent source for advice. The HSE is responsible for the regulation of almost all risks to health and safety arising from work in the UK – [www.hse.gov.uk](http://www.hse.gov.uk)

The nature and size of your event will have a direct bearing on the level of production equipment, facilities, services, staff and time required to make it happen. Make sure your assessment of what's required to facilitate the production process is accurate and build in contingencies where you can. Events with too short a production time can attract additional and unnecessary costs and the likelihood of making mistakes or missing out key steps in procedures that may affect health and safety will be greater.



### TOP TIP

Begin to draw up a 'production schedule' – a detailed plan of how the event/festival site will be prepared, operated and de-rigged. Include actions required, contractors, timeframe, etc.

It is not possible to comprehensively list all the production equipment, services and facilities that you may require (each event is likely to have a long and very specific list pertinent to its particular circumstances). Instead, we have provided some examples to help you put your own checklist together.

## Production Equipment – Sample Checklist

- Staging and associated structures – disabled platforms, sound delay towers, etc
- Lighting, audio and visual equipment
- Power – generators and distribution cables
- Electrical supplies
- Fuel
- Cable covers and ramps
- Plumbing supplies
- Joinery supplies
- Barriers, ropes & stakes, etc – front of stage, perimeter, no-go areas, queuing systems, etc
- Portacabins, tents, marquees, etc – dressing rooms, production and site offices, first aid points, catering, storage, baby change, etc
- Ballast – for staging, tents and other structures
- Temporary tracking & ground cover – trackway, blaze, hard core, sand, bark chips, etc
- Transport & vehicles – forklift, cherry picker, crane, off-road vehicles, flat bed trucks, vans, cars, etc
- Fire fighting equipment – fire extinguishers, blankets, etc
- Sports specific equipment – timing equipment, photo finish, hurdles, batons, etc
- Refuse disposal – bins, skips, etc
- Other plant hire
- On site office equipment – computer, printer, admin supplies, etc

- Seating and furniture – audience, offices, catering, dressing rooms, etc
- Canopies and coverings – for equipment, audience, etc in the event of inclement weather
- Site decoration and dressing
- Health and safety signage
- Directional and information signage

## **Types of Facilities & Services – Sample Checklist**

- Sanitary facilities and associated services
- Disabled facilities
- Waste/rubbish removal and recycling services
- First Aid & emergency services
- Catering – for crew, staff, artists, competitors, guests, audiences, volunteers, etc
- Phone lines
- Radio communications system
- Security services
- Stewarding services
- Information booth(s)
- Lost & found
- Meeting point
- Drinking water
- Changing facilities (sports events)

# Site/Venue Layout

Site or Venue Layout is very important to the health, safety and comfort of everybody attending and taking part in your event. A well considered layout can significantly influence an event's success. An event site or venue should be an effective space that suits the type of event being staged. When beginning to plan the layout, assess all the factors and risks associated with the following points: 1) Capacity; 2) Access, Egress and Flow; 3) Sterile Areas; 4) Surface and Underground Conditions; 5) Existing Site Features; 6) Placement of Equipment and Services; 7) Sanitary Facilities; 8) Local Residents; 9) Signage; 10) Facilities for People with Disabilities; 11) Litter and Waste. As you do this, you will be able to plot the various elements of the event to achieve maximum site efficiency and safety.

## 1) Capacity

The capacity of your site/venue is calculated based on the available audience space, the number of emergency exits (see Access, Egress & Flow) and the risk assessment for the venue and the event. Site Layout is therefore particularly important if you need to maximise the audience potential. Keep in mind:

- ▶ For outdoor events where a standing crowd gathers in a defined space to watch the entertainment (such as at a street theatre or a music event) the general acceptance for a clear, flat, open space with a reasonable view of the performance is 2 people per 1m<sup>2</sup>. However the figure should not be applied to all of the available space.
- ▶ Not all of the available space for the audience will have a clear view of the entertainment. In such instances a lesser figure should be applied or the area should be taken out of the equation altogether.
- ▶ Existing site features such as hills, trees and site line obstructions will further reduce the capacity.
- ▶ Other areas that may be in and around the audience space such as front of house areas, media stands, camera positions, judges boxes, sound delay towers, water towers, disabled platforms, etc will further reduce the capacity.

- ▶ Types of entertainment such as funfairs will have different calculations based on the number and type of rides and the available space between the rides.
- ▶ Your venue may be seated, standing or a combination of both. The seating available may be actual seats or it could be areas where people can sit on the ground. If the venue is outdoors you may or may not have covered areas to sit or stand if the weather is inclement. Each of these points will influence the final capacity of the event. Remember to also take into account any potential 'pinch points' around the venue.
- ▶ If the site/venue area is extensive, consider the viability of placing screens around the site to show the main entertainment. These may be helpful with increasing capacity potential while reducing the possibility of overcrowding or surging.
- ▶ Remember to recalculate the capacity if the site layout changes or if structures are added, removed, etc.
- ▶ As you can see, the calculation and issue of capacity can be tricky and it may be helpful to involve an experienced risk assessor who will provide advice and a maximum capacity figure after consideration of all the facts.

## 2) Access, Egress & Flow

The access, egress and flow of the audience, staff, equipment and the entertainment require careful consideration. A range of issues are required to be taken into account. These include:

- ▶ The venue may have existing or natural points of access/egress. If you have chosen an existing indoor venue, then its access and egress points (which will have helped determine the capacity) are likely to be fixed. However, if you are utilising an open-plan outdoor site you will have to determine where the best possible access and egress points should be for the audience, staff and equipment. The exit requirements depend on capacity and the acceptable time taken to exit the venue. Seek advice from the local authority and the Fire Brigade when calculating number and width of exits.
- ▶ Spectator flows at sports events, *i.e.* access and egress during sessions, should be considered.



- ▶ You must also check that any large equipment that is being brought to the event can fit through the access/egress and there is suitable turning space for large vehicles to enter and exit the venue.
- ▶ Do not mix pedestrian and vehicular access/egress if at all possible. Similarly, try to keep public, staff and performer/participant access/egress separate from each other.
- ▶ Ensure all access points have suitable gathering/queuing spaces for the audience expected and all egress points have safe exit potential.
- ▶ Individual or specially created access for the disabled may be required.
- ▶ Consideration must also be given to the emergency services. It is likely you will require the presence of first aid facilities at the event but in the event of a more serious incident arising, e.g. someone requires hospital attention or a fire tender needs access, clear access into the site, passage around the site and egress from the site is necessary. If appropriate, representatives from the emergency services should be able to advise on this point and may recommend sterile access routes or pathways for their use.
- ▶ To avoid the audience making their own paths, create clearly defined routes around the site that are wide enough to accommodate the amount of footfall that is anticipated.
- ▶ Ensure there is enough space for people to gather or queue at concession or entertainment areas without impeding the paths or access/egress routes.
- ▶ Avoid building dead ends into the layout at all costs as these could be detrimental to health and safety.
- ▶ The siting of entertainment should encourage a steady movement of the audience around the event site/venue. In other words, if there is multiple entertainment on offer, it should not be concentrated in the one area. This will help minimise the risk of 'hot spots' and bottlenecks building up. Avoid a haphazard or cluttered layout as this can impede flow.

### 3) Sterile Areas

Depending on the size and nature of the event, it may be necessary to build in areas to the site that are sterile – in other words, areas that the public should not gain general access. Areas such as a Rendezvous Point (for emergency services to use in the event of a major incident) or a fireworks fall-out zone require careful consideration of their placement, size and barrier/security protection system. Remember that the area chosen must be suitable for the function it will perform.

### 4) Surface and Underground Conditions

If the event is taking place outdoors, a thorough assessment of the existing and anticipated surface conditions is necessary. Bear in mind the following points:

- ▶ Ensure that the ground can accommodate what you intend to place on it (size, type and weight).
- ▶ Assess the impact that adverse weather conditions may have on the ground. Pay particular attention to the risk of flooding as this can cause the most damage to equipment and is a likely cause of cancellation.
- ▶ If you are anticipating adverse conditions, ensure you have contingencies in place to deal with all possibilities, e.g. water pump for flooding, temporary tracking or bark chippings for muddy areas, grit for frost paths/roads, etc.
- ▶ If appropriate, ask the land-owner or local authority for an underground utilities assessment to advise you about any underground cables, wires or pipes that could potentially be damaged by heavy equipment or penetration of the ground.
- ▶ The type of event and the chosen location may necessitate bringing in or creating temporary surface conditions such as tracking for transport or emergency services or to protect the ground below. Check that the ground beneath is suitable for the covering to ensure this doesn't become a hazard in itself.
- ▶ Ensure that any damage anticipated can be put right or reinstated as failure to do this could incur heavy financial penalties.

- ▶ If the event is indoors, check that the floor can take the weight of the equipment being used.

## 5) Existing Site Features

If your event is being held outdoors, you may have to accommodate existing site features in the site layout. Whenever possible, use these to your advantage but make sure that your risk assessment of these features identifies all possible risks they may pose and put in place the necessary control measures to minimise such risks. Site features may include: hills, gullies, open water, trees, overhead cables, public art or monuments, etc.

## 6) Placement of Equipment and Services

Different factors will influence where you finally position equipment and services but keep in mind the following:

- ▶ Place equipment and plant as close as possible to where it is needed without impeding audience view or affecting audience enjoyment. This will also help reduce the amount of cabling required.
- ▶ Ensure that any equipment that has to be placed in the vicinity of an audience is secured and can cause no harm. Place it in an area that is accessible should it require attention during the event.
- ▶ Any disabled viewing platforms should be positioned to ensure maximum visibility without negatively affecting audience capacity and sight lines.
- ▶ If there are simultaneous entertainments, position them to ensure there is no clash of sound or audience.
- ▶ Make sure all welfare services are in a convenient and visible location and are well sign posted. Similarly with rubbish bins, place them in visible locations and particularly around catering areas.

## 7) Sanitary Facilities

The calculation of the level of sanitary facilities required at events is based on a range of factors including the audience capacity, audience profile, location, duration and existing facilities. General guides exist but it is best to seek the advice of an experienced contractor and the local authority (Environmental Health) to ensure your estimate is neither too high nor too low. When planning these facilities, keep in mind the following points:

- ▶ Toilet 'clusters' are best placed in various locations throughout an outdoor site. They should be clearly signposted, adequately lit and positioned away from food preparation areas. These facilities should be cleaned and re-stocked regularly throughout the day and, depending on the length of the event and the type of unit used, they may require to be emptied during the course of the event. If this is the case, ensure that the siting of them allows for vehicle access.
- ▶ Everyone using the toilet should be able to wash their hands with warm water (ideally) and soap. Again, these areas should be kept clean and restocked regularly. If wash facilities have to be separate from the toilets, ensure that you leave enough room when planning the site and ensure that appropriate drainage is possible to avoid unsanitary or flooded conditions. Again, your contractor and local authority can advise on this matter.
- ▶ Ensure there are sanitary facilities in the vicinity of first aid and baby change areas and don't forget about the artists, participants, employees and concessionaires that will require appropriate facilities too. If there are camping opportunities at the event, you will also need to supply washing and toilet facilities for this group.
- ▶ If you have an area set aside for people with disabilities, appropriate sanitary facilities should be placed in the vicinity and clearly signposted.

## 8) Local Residents (Commercial and Domestic)

When planning the site layout, keep in mind local residents (if there are any) and bear in mind the following:

- ▶ Make sure event elements such as access/egress points, transport drop off points, parking arrangements, sterile areas, etc do not impede entry to or encroach on their property.

- ▶ If the residents are commercial, ensure the site layout and nature of the event do not hamper their day-to-day business.
- ▶ If the event is using sound systems, where possible point the sound away from the residents.
- ▶ You may need to hold a special meeting with the local residents to familiarise them with what will be happening on their doorstep and provide reassurance about how you will minimise any concerns they may have in connection with the event.
- ▶ Be prepared to make special arrangements for those who are particularly negatively affected and ensure all residents are informed of what is happening either through a special meeting and/or a leaflet or letter drop to their residence.

## 9) Signage

Regardless of how well-considered the layout is, if you do not have the appropriate signage to direct people around the site/venue (or to follow in the event of an incident) the space could be rendered ineffective, crowd management issues may result and health and safety compromised. For further information on safety signage legislation see HSE's The Health & Safety (Safety Signs and Signals) Regulations 1996 at [www.hse.gov.uk](http://www.hse.gov.uk)

You may require a range of signage to perform various functions:

- ▶ **Directional signage** – e.g. to direct people to the nearest exit, toilet, bar, etc.
- ▶ **Information signage** – e.g. to tell people where they are in the venue/on the site, to show people where facilities are on the site, the running order of the entertainment, etc.
- ▶ **Safety signage** – e.g. showing the location of emergency exits, fire fighting equipment, danger zones, etc.
- ▶ **Welfare signage** – e.g. meeting point, baby change, lost persons, drinking water, first aid, etc.



### Points to consider are:

- ▶ The location and timing of the event will dictate whether you need to light some of the signage (such as exit signage in marquees, indoor venues, night time events, etc).
- ▶ All signage should be of the correct dimensions and design and placed appropriately around the site/venue so as to be clearly visible.
- ▶ If your event is outdoors, ensure all signage is waterproof, wind permeable (as appropriate) and fastened securely.
- ▶ Make sure arrows are pointing in the right direction.
- ▶ Place sponsorship banners/signage in visible positions (agreed in advance with your sponsor – see Chapter 5) but ensure they do not impede audience sightlines or flow.
- ▶ Remember signage will be required for all areas of the event including back stage, production areas, media locations and dressing rooms as well as front of house where the audience is.
- ▶ Remember to think about how the audience will find the event. Ensure the event site is well signposted at access points coming into the town and at key junctions. Organising AA signs can be an inexpensive way to achieve this [www.theaa.com](http://www.theaa.com)
- ▶ It's worthwhile creating a 'signage plan' to address how, where, when and who will erect the required signs and banners – always ensure the appropriate permissions have been sought.

## 10) Facilities for People with Disabilities

An inclusive approach is required for all aspects of event planning. People with disabilities have the right to equal treatment and should not be discriminated against. At the planning stage ask yourself if you need to implement special measures in order to make the event accessible to people with mobility problems, sight or hearing impairments or other special needs. You must make the appropriate provision for suitable access to and egress from the event as well as goods, services and facilities for all. Provision may include:

- ▶ Widened access/egress doors and routes
- ▶ Ramps
- ▶ Handrails
- ▶ Lifts
- ▶ Sanitary Facilities
- ▶ Lowered surfaces – for instance at food outlets and info points
- ▶ Floor surfaces & ground coverings
- ▶ Parking
- ▶ Transport to and around the event
- ▶ Seating
- ▶ Viewing areas
- ▶ Signage
- ▶ Hearing systems
- ▶ Staff or stewarding support
- ▶ Light and sound levels
- ▶ Accommodation
- ▶ Free access for carers

Remember to consider people with disabilities when preparing emergency and evacuation plans. Further information on this topic can be gained from [www.direct.gov.uk/disability](http://www.direct.gov.uk/disability)

## 11) Litter & Waste

Events can create a tremendous amount of litter and waste that has to be collected, disposed of and recycled as appropriate. A build up of waste can be harmful to the health and safety of all those involved or affected by the event and the environment. It is therefore important to prepare for and stay in control of this issue. As event manager you must ensure that rubbish and waste is disposed of in the correct manner. If you are using a waste management contractor, make sure they are reputable and can supply you with method statements.

Create a Waste Management Plan in advance of the event. This will help identify areas of concern and how the issue will be addressed. Your plan should consider the following:

- ▶ The event type, audience profile and capacity.

- ▶ Waste generators, e.g. production, administration, catering, bar operators, general public, artists, pyrotechnics, toilets & showers, medical areas, etc.
- ▶ Waste types, e.g. food remnants/paper/plastic at catering concessions, wood/metal/paper/fuel at production area, drink cartons/food/paper flyers/etc front of house.
- ▶ Waste receptacles and requirement, e.g. skips, plastic bins, bottle banks, etc.
- ▶ Waste locations, e.g. skip in production area, bottle bank for bar use.
- ▶ Recycling opportunities (recycle and reuse whenever possible).
- ▶ Waste management activity, *i.e.* what is going to be uplifted, when will this happen and by whom (before, during and after the event).
- ▶ Waste management promotion, *i.e.* how will you encourage others to minimise waste and dispose of it properly.



### TOP TIP

Be aware of any specific restrictions that your site/venue may pose as these will have an impact on the planning process.

## Site/Venue Plans

Site (or venue) plans or maps are necessary for any event. They serve as a tool to help calculate the capacity and maximise the effectiveness of the site/venue in the planning stages. They also act as a communication tool between everyone involved during build-up and the live event. A copy of the plan(s) should be included in the Event Manual (see Chapter 10) and larger versions should be given to all the managers, appropriate contractors and agencies working at the event for quick and easy reference.

If you are using an existing venue, it is likely a floor plan will already be in existence which you can get a hold of and add your information to. If you are working outdoors, it is likely you may have to start your plan from scratch. Ask the land owner or the local authority if they can provide you with a blank map of the area, showing existing site features such as hills, walls, trees, paths, roads, etc. You can then start to add in your particular information.



Below is a list of some of the elements that may appear on your site 'master' plan. If this plan is particularly complex, it may be an idea to prepare simplified plans for individual user groups or purposes, e.g. showing emergency routes of access/egress for services/audience. If the site is extensive with multiple entertainment locations it would be advisable to include a very basic plan in the printed event programme and on display at the site itself with a 'you are here' marker clearly displayed.

Site layout often changes throughout the planning stages. Make sure you keep the plans up-to-date and distribute to necessary parties as required.

For outdoor event site plans the final version is likely to feature:

- ▶ A grid running 'a,b,c', etc one way and '1,2,3', etc the other. This allows for easy reference when communicating with others – particularly the emergency services and event security during the live event
- ▶ The compass direction showing 'north'
- ▶ The scale
- ▶ Points of access and egress. Note – mark all points including ones being used by emergency services, disabled access, etc
- ▶ Pathways, routes and roads
- ▶ Entertainment/staging/field of play areas
- ▶ Other activities such as children's activity area, funfair, medal presentation locations, etc
- ▶ Audience areas – seated and standing
- ▶ Accredited areas
- ▶ Front of house and sound delay tower positions
- ▶ Venue operations centre/joint agency control centre
- ▶ Media points
- ▶ Services and utilities points, e.g. toilets, first aid/ambulance location, lost property and persons, information, meeting point, disabled platform, telephones, ATMs, drinking water, etc
- ▶ Police and security points
- ▶ Sterile areas and emergency rendezvous points
- ▶ Parking and transport
- ▶ Box Office/ticket points
- ▶ Rubbish points

- ▶ Food and drink dispensing and consuming points such as picnic/barbeque areas, bars, food vans, etc
- ▶ Camping areas and other accommodation
- ▶ Administration, production and storage areas
- ▶ Generators and electricity points
- ▶ Artist and hospitality areas
- ▶ Existing site features
- ▶ A clear legend explaining the map symbols and colours

## Health & Safety

Health and Safety is a high-priority area in event organisation. Effective health and safety has to be carefully planned, managed and controlled. As the event manager you must consider the health and safety of:

- ▶ Everyone working in your organisation and at the event
- ▶ Everyone performing at or taking part in the event
- ▶ Everyone attending the event
- ▶ Everyone who may be affected by the event

You also must ensure that everyone who is working on the event understands the importance of the health and safety issues and works together to achieve a safe event for all.

The elements covered in this section are fundamental issues that will help you manage health and safety. Each event will require different arrangements and these should be discussed at length with the appropriate authorities. There are also many publications (some of which may be specific to your particular event type) which will give you good advice to help you plan and execute a safe event. As stated at the beginning of this chapter, the 'Purple' and 'Green' guides and the HSE website are essential resources.

## Safety Officer/Co-ordinator

Depending on the size and nature of your event, you may need to appoint a Safety Officer. The basic requirement is that a 'competent' person (often the event or production manager) is able to provide access to a good level of health and safety expertise. Competence is usually achieved through a combination of experience and formal health and safety qualifications. Consultants are often used to supplement this expertise. Whoever is responsible should have suitable training and experience to be able to advise on and implement safety procedures.

## Health & Safety Policy

Your Health and Safety Policy should set out your organisation's commitment to health and safety. If your organisation has more than five employees, it is a legal necessity to have a policy in place already. However, this general policy is likely to be different from one you will produce specifically for the event. The event-specific policy should set out:

- ▶ Who is responsible for health & safety within your organisation
- ▶ Who will monitor health & safety at the event
- ▶ Arrangements for each aspect and phase of the event
- ▶ How others should follow and interpret the policy (the Event Safety Memo)
- ▶ Staff training procedures

Subcontractors should provide you with their own policies. These should be checked to ensure there is no conflict with your policy or your event safety memo.

## Event Safety Memo

It's a good approach to produce an Event Safety Memo to be distributed to all those working at the event (preferably at the 'induction' or briefing meeting). This memo should give specific and easy-to-follow advice to all employees, volunteers, subcontractors, etc who are working at your event during the build, the live event and the 'get-out'. It should set out how you, as the Event Management, expect others to conduct themselves while on site or at the venue. It should highlight particular safety aspects they should be aware of such as fire controls, emergency exits, evacuation procedures, incident or emergency codes and procedures, personal protective equipment/clothing required, incident reporting procedures, hazards, etc.

## Reporting Procedures

For every aspect of health and safety, you should have a procedure for reporting incidents and occurrences. It should be clear in the Event Safety Memo, how and to whom individual incidents should be reported. Each incident or occurrence should be written down and described in full. Ensure staff and volunteers are well briefed on how to report any incident. Reports will likely take the form of:

- ▶ Accident/Injury
- ▶ Incident
- ▶ Lost Persons
- ▶ Lost/Damaged Property
- ▶ Safety/System Failures

RIDDOR: In April 2001, the Health & Safety Executive (HSE) launched a new Incident Contact Centre (ICC) for all incidents currently reportable under the Reporting of Injuries, Diseases and Dangerous Occurrences Regulations (RIDDOR) 1995. The ICC is a joint venture by the HSE, COSLA and Local Government Associations (LGA), and it provides a central point for employers to report incidents irrespective of whether their business is HSE or Local Authority enforced. For more information visit [www.riddor.gov.uk](http://www.riddor.gov.uk)

## Normal Operating Procedures

If the location in which you stage the event is an existing venue, it is likely that it will have in place Normal Operating Procedures. Ensure you are aware of these and incorporate them into your planning.

## Monitoring & Inspections

Continual monitoring of health and safety procedures is essential to ensure they remain effective. Inspections of the event site should take place before, during and after the public are on the premises/site and inspections of operating procedures by event staff and contractors should be a continual process throughout.

## Plans and Drawings

In addition to your site or venue plan, if your event features any staging or structural elements, it is likely you will have to provide structural drawings to the local authority, Fire Brigade, etc. If you have subcontracted these elements, the subcontractor will provide you with copies. If the structure has been made specifically for the event ask the original architect or engineer for copies along with the Method Statement for its construction.



## Method Statements

A Method Statement describes how a specific action or task is facilitated. It describes to others the process by which an operation will take place and usually relates to the 'production' aspect of event organisation. In writing method statements, you will identify the safest procedure for the task in question. This will assist you when it comes to writing the Risk Assessment. Again, subcontractors should provide you with their own Method Statements.

## Communications

No event can operate successfully without the implementation of a thorough Communications Strategy. The size of the event and the number of organisations involved will influence the complexity of the strategy.

From a health and safety perspective the strategy will require two areas to be addressed:

### 1. Communication between all parties involved in the event planning

- ▶ Good communication is crucial during the planning stages. As the event manager, you should ensure that all agencies are effectively communicating with each other and with you. A roles and responsibilities chart or statement may help you in this task. Make sure that meetings are minuted, agreed actions are followed through and there is a paper trail for all decisions that have been agreed.
- ▶ During the event itself, the Event Manual (see Chapter 10) and Site/Venue Plan should be valuable tools that aid good communication. It is therefore vital they contain up-to-date information. If the nature and size of your event requires a multi-agency presence, it is likely each organisation will employ their own communications system and use their own equipment. Consider setting up a Joint Agency Control Centre (JACC) or Incident Room at the event which hosts all agencies' communications personnel to assist quick and decisive decision making.
- ▶ If you are using radio communication, ensure that frequencies do not clash with other radio users. Allocate a channel on your system for different user groups such as Production, Management, Artist Liaison, Front of House, Emergency Channel, etc. Ensure all staff know how to use the equipment, provide guidance/training and keep

accurate records of all communications and decisions. Decide in advance any codes or lingo to be used in the event of an incident or emergency and ensure that everyone knows their meanings. Document them in the Event Manual and Event Safety Memo.

- ▶ Ensure all key staff have mobile phones but do not rely on them for essential communication – especially if network coverage is not strong.
- ▶ Supply all staff with easy-to-read laminated cards which feature the contact numbers of all key individuals involved in the running of the event along with radio channels. These cards can be worn on a lanyard together with accreditation/access passes.
- ▶ Arrange a briefing session for all staff working on the event. This should cover introductions so that everyone is aware of lines of command and responsibility, health and safety, communications and all procedures, practices and regulations that dictate the conduct of staff whilst working on the event. It's a good idea to provide a 'Staff Briefing Document' to be distributed before or at this briefing session so event workers can refer to it as required. (See Chapter 10 for a guide to preparing your Staff Briefing Document).

## **2. Communication with the public at the event**

- ▶ There are many ways to communicate with the public at the event including information stands, printed material, stewards, screen messages and PA announcements. Your strategy should take into account how you will communicate with the public in the event of an incident or emergency.
- ▶ However you decide this should be achieved, announcements and instructions must be conveyed in a clear, audible and succinct manner. Rehearse potential scenarios with the Health and Safety Sub-Group (if appropriate) and agree what will be said, when it will be said, how often, who will say it and by what means for each scenario. Make sure you have contingencies in place should equipment fail.
- ▶ Note – at a sporting event, the commentator is ideally placed to make safety announcements and should therefore be well briefed and in radio contact.



## Emergency Services

Your contact with the Emergency Services will depend on the type, scale and complexity of your event. If you are planning a medium-scale, indoor event in an established venue, you may not require the assistance of the Emergency Services during the planning and operation of the event. However, for larger and more complex events it will be necessary to seek their advice, assistance and co-operation. Each service usually has its own planning and special projects departments which deal with events. If appropriate to the nature of your event, you may wish to invite one or more people from the following agencies onto your Health and Safety Sub-Group:

- ▶ **Police** – the Police may advise on many safety aspects such as audience numbers, crowd control, emergency procedures, communications, traffic management and emergency services access, etc. Their presence at a live event will depend on the nature of the entertainment, the scale of the event and the level of stewarding.
- ▶ **Fire Brigade** – the Fire Brigade may advise on occupant capacity, potential fire hazards, fire fighting equipment required, equipment locations, emergency access, means of escape, signage, lighting, rendezvous points, pyrotechnic elements such as fireworks, fire sculptures or bonfires and other emergency procedures.
- ▶ **Medical Services** – depending on the nature and scale of the event you may require the assistance of the local health board, Scottish Ambulance Service or a first aid organisation such as St Andrews Ambulance or the British Red Cross. Seek their advice on the medical provision required such as numbers of doctors, nurses, physiotherapists, first aiders, accommodation and facilities as well as emergency access and other procedures. Remember that first aiders are usually volunteers but a donation should be made to their organisation who will advise you as to the appropriate level of support.
- ▶ **Fees** – note that charges may be levied by some or all of the Emergency Services. Make sure you factor these costs into your budget at an early stage.

## Medical Provision

The type and amount of medical provision required at events varies enormously depending on the size, nature and location of the event. Medical provision must be available to everybody working on, performing at, competing in or attending the event. As far as is practicable, an event should be self sufficient in order to minimise the impact on the day-to-day provision for the local community. Factors that will influence what provision is required include:

- ▶ **Nature of event** – programme, activities, sports
- ▶ **Location** – indoor, outdoor, size of venue, proximity to existing services
- ▶ **Venue** – standing, seated
- ▶ **Duration** – few hours, multiple days
- ▶ **Weather conditions** – the season, inclement weather
- ▶ **Size of audience**
- ▶ **Audience Profile** – young, elderly, teenagers
- ▶ **History** – previous casualties/incidents, first time event
- ▶ **Other hazards** – identified in risk assessment

**Note: Medical provision at many events is a mandatory requirement.**

Remember that it is not only medical personnel that may be required. Facilities, equipment, transport and liaison personnel may also have to be organised and budgeted for. Medical provision should be discussed and agreed well in advance with the appropriate authorities and providers.

## Welfare Services

The easier you make it for people to attend your event, the better the experience they will have. Think about the audience you wish to attract to the event and their potential needs. A happy, stress-free attendee is likely to come back to future events. Some services to consider are:

- ▶ **Drinking Water** – this should be supplied at all types of events, particularly at those held outdoors. Depending on your existing venue/site services, you may have access to mains drinking water. If not, water can be supplied from bowsers (water containers) that are fit-for-purpose or bottled water made available. Pay particular

attention to areas of potential congestion such as at front of stage areas at an all-standing event.

- ▶ **Baby Change** – if your event is family oriented, provide a facility for parents to change babies' nappies. Ensure the accommodation is secure with suitable furniture, supplies, waste disposal and washing facilities present. Also, think about providing a private area for mothers to breastfeed babies, should they wish.
- ▶ **Meeting Point(s)** – if the event covers a large area or if there is the potential for people to become separated from their group, provide one or more well-signposted meeting points. Remember to number meeting points to avoid confusion.
- ▶ **Lost Persons** – if the event is family oriented or you are anticipating children attending the event, it is crucial to provide an area where they can go, or be taken to should they become separated from their parent or guardian. Ensure that the facility is staffed at all times by more than one suitably qualified staff member (remember that all staff working with children and/or vulnerable adults must be checked by the Scottish Criminal Record Office/Disclosure Scotland in advance – contact them at [www.scro.police.uk](http://www.scro.police.uk), [www.disclosurescotland.co.uk](http://www.disclosurescotland.co.uk))

Agree a plan/policy in advance of the event that addresses the process of receiving, caring for and handing children back to their parents/guardians.

- ▶ **Information Points** – depending on the complexity, length and type of event, it may be wise to have a point or points of information. Those staffing these positions should be knowledgeable about the event, the venue/site, parking and transport arrangements, etc and must also be kept informed of any programme changes that the public needs to know about.
- ▶ **Lost Property** – a point for Lost Property is appropriate at events of all types and sizes. Agree a procedure in advance with those staffing the area to ensure that property is being reunited with the correct owner.
- ▶ **Cloakroom Facilities** – ensure that the area is suitably stocked, secured and staffed throughout the event. Agree a policy and procedure on receiving bags, luggage and other accessories. Ensure that patrons are aware if items are left at their own risk.



**Remember:  
Consider all  
age groups...**

**Think about  
your audience  
in detail.**

- ▶ Other services you may decide are necessary will be dependent on the nature of the event. Remember to carefully consider the audience profile when consolidating the list of services.

## Traffic & Transport Management

Good traffic and transport management is a key issue for events. Poor planning can lead to unnecessary disruption for those involved in or attending the event as well as the normal day-to-day traffic. Consider this aspect in detail when selecting your venue. As appropriate, include the local authority, Police and transport providers at the earliest stage possible to help you make arrangements. For large events it may be necessary to form a Transport Management Sub-Group to consider all issues surrounding this topic and to formulate effective plans for transport, traffic and parking. Consider the following:

- ▶ The event type, audience size and profile
- ▶ The anticipated number of vehicles (audience, staff, contractors, etc)
- ▶ Existing transport links and the potential for enhancement
- ▶ Existing parking opportunities for cars, buses and other vehicles
- ▶ Park and ride facilities (existing or temporary)
- ▶ Transport routes for vehicles, buses, trains, underground
- ▶ Drop off and pick up locations for buses, taxis, etc
- ▶ Existing signage and the potential requirement for temporary signage (e.g. AA signage)
- ▶ The requirement for coning and parking suspensions
- ▶ Temporary traffic regulation orders such as road closures and re-routing (the local authority can advise on requirements, notification and timescales)
- ▶ Staffing – who will marshal the traffic, who will staff the car parks, etc
- ▶ The potential for charging for parking to help offset costs
- ▶ Pedestrians entering and leaving the venue/congestion issues
- ▶ Access for production, artist, subcontractor vehicles, etc
- ▶ Emergency access for fire tenders, ambulances, etc
- ▶ Traffic movement on site

## Security and Stewarding

The size and nature of your event will influence the type and amount of security and stewarding measures required. When planning your event, consider the following:

- ▶ Crowd management
- ▶ Artist/performer/competitor/guest protection
- ▶ Equipment and facility protection
- ▶ Entrance, exits and perimeter security
- ▶ Traffic/car parking management
- ▶ Sterile and danger areas
- ▶ Assistance to emergency services
- ▶ Emergency procedures
- ▶ Overnight security
- ▶ Restricted areas
- ▶ Cash storing and handling

If employing a security or stewarding firm ensure they are reputable and experienced. If appropriate, invite a senior supervisor to join the Health and Safety Sub-Group at the earliest opportunity to ensure they are as familiar as possible with the event and so that they can contribute to health and safety procedures which are being agreed. Assess all risks with the security/stewarding contractor to reach a conclusion as to the level of service required at the event and ensure all agencies are comfortable with the provision, roles and responsibilities of the contractor. Ask the contractor to supply you with details of the Supervisors/Chief Stewards who will be responsible at the event. Organise a pre-event briefing with all security/stewarding staff to ensure that all questions are answered and everyone is clear about their role at the event.

Regulation of the private security industry is delivered through the Security Industry Authority (SIA). The SIA exists to manage the licensing of the private security industry as set out in the Private Security Industry Act 2001; to raise standards of professionalism and skills within the private security industry and to promote and spread best practice. In 2007, SIA licensing will be extended to include Scotland. For up-to-date information visit [www.the-sia.org.uk/scotland](http://www.the-sia.org.uk/scotland)

## Risk Management

No matter the type and size of your event, risk management is a critical issue in the planning process. Simply put, risk management is about foreseeing and identifying potential risks, evaluating them and putting in place a plan, control measure or contingency to reduce or neutralise the level of risk. A good event manager will incorporate risk management at all stages of the planning process. In terms of event production, the issue of risk management is of the utmost importance when making decisions that impact on those who have a chance of being affected or harmed by any aspect of the event. They could be:

- ▶ Event staff and crew
- ▶ Audience and others attending the event
- ▶ Performers/competitors and their entourages
- ▶ People/residents in the vicinity of the event

The event manager has a duty to identify and minimise these risks. The best way to do this is to undertake an effective risk assessment.

### Risk Assessment

No one knows your event better than you and your key team. From this point of view, as the event management, you are best placed to undertake the assessment and each 'department' should carry out their own assessment to be consolidated into the final version. For larger or more complicated events, you may wish to seek the assistance of an independent risk assessor who is knowledgeable on your type of event. If appropriate, the event's Health and Safety Sub-Group should take an active role in the risk assessment process, agree to the control measures and take steps to implement any aspects for which they as individuals or their organisations have responsibility.

The Risk Assessment should be completed well in advance of the event. You should provide a copy to your insurance broker or underwriter and include a copy of it in the Event Manual. Ensure that all key staff and personnel are familiar with it and all safety measures are implemented before the event starts. Should any additional risks be identified prior to the event, a specific assessment should be carried out for each new risk.

At the end of this chapter there is a template to help you complete a Risk Assessment. In doing so, you will undertake the following steps:

- 1. Identify the area of risk and related hazards**
- 2. Decide who or what is at risk**
- 3. Decide what measures will be put in place to control the risk**
- 4. Evaluate the level of risk**

**Risk factors are unique to every event but some areas of consideration may include:**

- ▶ Type of event – nature of programme, timing, etc
- ▶ Venue – seated/standing, capacity, access/egress
- ▶ Location of event – outdoor/indoor, geography (near roads/railways, etc)
- ▶ Ground conditions
- ▶ Crowd – profile, history, habits, disorder, surging, special needs, welfare, etc
- ▶ Weather – adverse conditions (very hot/cold/wet, etc)
- ▶ Vehicle movement – on and off site
- ▶ Contractors
- ▶ Working at height
- ▶ Structures – permanent and temporary, collapse, trip hazards, etc
- ▶ Barriers
- ▶ Equipment – production, safety, etc
- ▶ Electrical equipment and supply
- ▶ Traffic management
- ▶ Car parking
- ▶ Sound and noise – inside and outside venue, before, during and after event
- ▶ Pyrotechnics
- ▶ Fire
- ▶ Explosion
- ▶ Terrorism
- ▶ Emergency announcements
- ▶ Security – audience, staff, venue, cash handling, etc
- ▶ Drugs – anti-doping, audience profile, etc
- ▶ Animals
- ▶ High profile artists, dignitaries, VIPs

## Appendices

If your Risk Assessment has to be distributed to partners/authorities independently of the event manual, you should append the various information that will support your Risk Assessment. The nature of these will be dependent on the type of event you are producing. These appendices may include:

- ▶ Event Safety Memo
- ▶ Production Schedule (a detailed plan of how the site will be prepared and de-rigged)
- ▶ Site Maps
- ▶ Contractor Risk Assessments/Licences/Fire Certificates, etc
- ▶ Where venues are hired rather than created, you may find it appropriate to append the Normal Operating Procedures (NOPs)
- ▶ You could also discuss with your risk assessor and/or health and safety sub-group whether your event warrants an emergency scenario planning session

## Event Risk Assessment Template

This template provides an indication of the kind of approach that is acceptable when carrying out a Risk Assessment for an event. You can also refer to The Health & Safety Executive's '5 Steps to Risk Assessment' guide – [www.hse.gov.uk](http://www.hse.gov.uk)

FIGURE 9.1

<b>Risk Assessment for (Name of Event)</b>	
<b>Type of Event:</b> (short summary)	<b>Event Location(s):</b>
<b>Event Date(s):</b>	<b>Type of Venue(s):</b> (List the various event venues/ arenas/roads to be used etc)
Site Build Period: Live Period: De-Rig Period:	<b>Estimated Attendance</b> (Breakdown into days/ sections as appropriate)
<b>Event Running Times:</b>	<b>Participants/Artists:</b>  <b>Spectators/Audience:</b>
<b>Details of Event Partners:</b>	<b>Overview: Operations Covered by Risk Assessment</b> (If appropriate, you can break down your event into sections for assessment. For example, Section A could cover the build and de-rig period, Section B the event itself).
<b>Circulation:</b> (i.e. details of the group that you will send the risk assessment to)	<b>Section A:</b>  <b>Section B:</b>
<b>Assessment undertaken by:</b> (name and contact details for Risk Assessor, Safety Officer or other 'competent' person)	<b>Signatures:</b>  <b>Event Organiser:</b>  <b>Risk Assessor:</b>
<b>Signature:</b>	<b>Event Organiser:</b>
<b>Date of Assessment:</b>	<b>Date:</b>





chapter ten

# **operational communications: the event manual & staff briefing document**



**This section describes two operational communication tools: 1) The Event Manual and 2) the Staff Briefing Document. Guides are provided to help you create your own versions.**

## **1) The Event Manual**

### **What is an Event Manual?**

The Event Manual is a key tool that provides guidance and reference for all principal staff and advisors working on the event itself. It recounts final decisions taken by the project's key planners on all operational aspects of the event and provides a practical operational guide.

### **Do I Need an Event Manual?**

Our advice is 'yes, you do' because it will help you ensure that all the operational aspects that have been decided upon to date are logged in the one document. Therefore, when it comes to the event itself, the key decision makers in the event team and any outside agencies are all working from the same information. The information that follows may seem quite extensive but use it as a guide and include only what is relevant to your event. If your event is small and straightforward, your Event Manual should be pretty lean and it may have a very limited/internal distribution. If your event is more complex, for instance, if it is a large outdoor event or it takes in a number of venues, your Manual will feature more information and is likely to have a wider distribution list.

### **Who writes the Event Manual?**

The event organisers should principally write the Event Manual. But if the operational aspects of your event have been planned with assistance and advice from outside agencies or partners who have an operational role, ensure that you reflect this in the way that you assemble the Manual. It's important that all key planners and agencies

agree to the Manual's methods and recommendations before it is published and distributed.

## Who should receive an Event Manual?

The Event Manual may contain sensitive information and so the distribution should be confined to key individuals, agencies or authorities that have a decision-making role at the event and those who have contributed and agreed to important safety information that is included in the Manual.

## What's in the Event Manual?

The Manual is essentially a 'How To' guide. It should contain all information that is relevant to the operational aspects of the event. Assemble your Manual with clear chapters or sections and make sure each page is numbered. A suggested format may include the following:

- ▶ **Front Cover** – remember to state the event name and dates as well as the date of issue
- ▶ **Contents Page** – clearly set out the chapters/sections with page references. State who has prepared the Manual
- ▶ **Distribution List** – list all those who are to receive a Manual and who they represent
- ▶ **Contact Details** – for each individual
- ▶ **Roles and Responsibilities** – of all key agencies involved in the project in operational terms
- ▶ **Introduction and/or Statement of Intent** – a message from the event manager about the Event Manual's use
- ▶ **The Event** – a general overview
- ▶ **Running Order** – of the main event and any ancillary attractions
- ▶ **Site/Venue Plans** – the physical layout of the event site
- ▶ **Method Statements** – on all operational and safety aspects of the event. This section may include information on production, access & egress (of artists, competitors, staff and public), security and stewarding provisions, traffic, transport and parking arrangements and site facilities (such as toilets, medical provisions, lost persons, drinking water, etc). Ensure all Facilities mentioned are plotted on the site/venue plans. Order these sections in a logical manner.

- ▶ **Production Schedules** – timed schedules for build-up, live event and take-down
- ▶ **Event Communications** – on all aspects of communication such as basic information about site contacts (where to find people and how to get in touch on site) and radio links (who has a radio, which channel are they on). A copy of the event permits and passes (*i.e.* parking passes, access all areas, staff, etc) could go in this section to inform everyone of what they look like and what they mean – but make sure the information cannot be duplicated. If the size or complexity of the event require a Joint Agency Control Room, an explanation of its function and identification of those who will be present could be included in this section.
- ▶ **Emergencies and Protocol** – detail procedures for lost persons, medical emergencies, show stopping, evacuation and any other emergency announcements should also be included.
- ▶ **Appendices** – for ancillary and support information that may be required for reference during the operation of the event. Risk assessments, site rules, safety memos, staff briefing document, pre-event control measures, outside agency statements of intent, etc can all be included here as appropriate.

## How detailed should the Event Manual be?

Don't underestimate how crucial the Event Manual can be in the smooth running of an event. It is a tool that should be continually referred to by those who receive a copy. The reader must be able to trust its contents and so the information should be as detailed and up-to-date as possible. The information should be presented in plain English and be clearly indexed. The Manual must be streamlined and portable. If the information you are providing is proving lengthy, decide whether appendices could be presented separately. However, ensure that all those who have agreed to the methods within the Event Manual are also familiar and subscribe to the information contained within any appendix.

## When to write the Event Manual

An Event Manual should be as up-to-date as possible but don't leave writing it until the last minute. Start the first draft of the Manual as soon as the project gets up and running. Add information when it becomes available and remove any obsolete information when the updated version is available. Make sure you keep a back up of the latest version of the Manual on disc or in hard-copy form.



## When to distribute the Event Manual

A distribution date should be set in the early/mid planning stages. This provides a deadline for you to work to. The chosen date should be close enough to the event to allow for as much current and relevant information as possible to be included but time should be allowed for the recipient to read and reply. Any amendments and additions must be circulated to the full distribution list before the event is held (again, leave enough time for the new information to be read). Ensure amendments are dated so that the reader knows they are looking at the latest version. Mark copies 'draft' or 'final' as appropriate.

## 2) Staff Briefing Document

### What is a Staff Briefing Document?

The purpose of a Staff Briefing Document (which may sometimes be referred to as a Code of Practice) is to provide a firm set of principles, practices and instructions to help guide event staff in their operational roles. This document can prove very useful by communicating a lot of vital information in a succinct manner. In doing so, it can ensure continuity, reduce the amount of briefing time and provide a level of comfort for staff working at the event.

### Who should receive a Staff Briefing Document?

All event staff. It should also be included as an appendix to the Event Manual.

### What is in a Staff Briefing Document?

All procedures, practices and regulations that dictate the conduct of staff should be included along with general information about the event. To help you get started, add to and adapt the following headings to create a Staff Briefing Document relevant to your particular event. Some elements may be taken from the Event Manual but, because of the casual distribution of the Staff Briefing Document, do not include sensitive information.

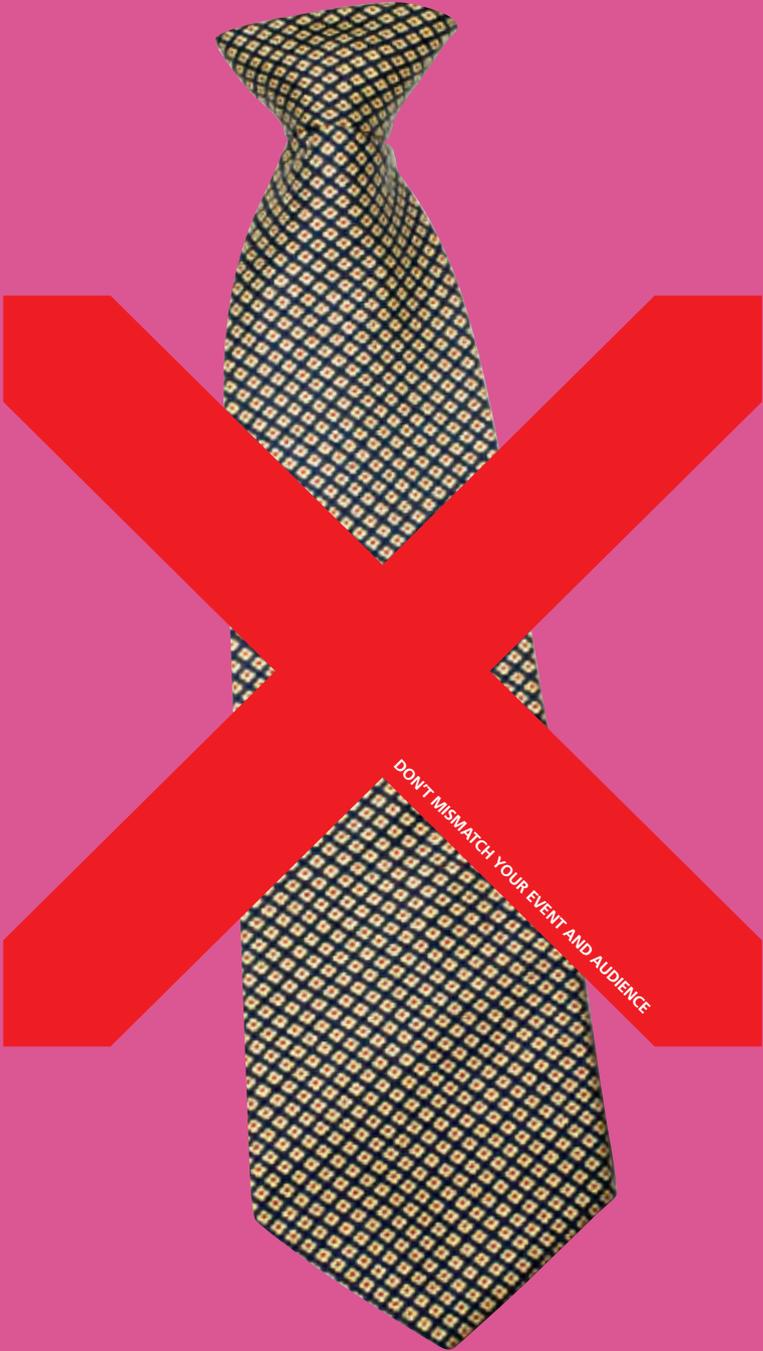
- ▶ **Contents Page** – that clearly sets out the section headings and where to find them
- ▶ **Statement of Intent** – informing the reader of the document's purpose

- ▶ **Additional Copies** – including information about where to get one in the event of loss or damage
- ▶ **Who's Who** – provide a list of the event staff, their roles, responsibilities and chain of command
- ▶ **Event Description** – including a programme or running order and a location map showing the venue layout, where the event elements are taking place and where all facilities are to be found (toilets, first aid, drinking water, etc)
- ▶ **Procedures, Practices and Regulations** that staff will be required to follow in their daily duties and implement in the event of an incident arising. You could separate this section into three broad categories:
  - 1) **Identification, Appearance & Conduct** – how different staff roles are identified (e.g. ID/laminates, what the staff are required to wear and how they are required to behave)
  - 2) **Operational Practices** – guidance on how to duties are to be carried out and how other procedural aspects work
  - 3) **Health & Safety Guidance** – event safety memo containing details of control measures, the procedures to deal with health and safety issues (e.g. accidents, fire, evacuation, etc)
- ▶ **Pro Forma Reports** – reports that staff may be required to complete. These could be time sheet, event property sign in/out sheets (uniforms, equipment, etc), accident report, incident report, etc. Ensure that it is clearly stated at the beginning of this section, and on each of the individual reports, the procedure for completing, reporting and filing.





chapter eleven  
**marketing and  
communications**



DON'T MISMATCH YOUR EVENT AND AUDIENCE

**This section aims to give those who are new to event marketing and communications a basic guide to help them through the planning process. It may also act as a stimulus for more experienced event marketers to review or rethink existing activity.**

This section covers: 1) Where to start; 2) Who should devise the marketing plan; 3) Resources; 4) Identifying your target market; 5) Forming the marketing objectives; 6) Developing the marketing strategy; 7) Marketing tools; 8) Media relations; 9) A marketing plan template.

The development of an effective marketing and communications plan is essential for the delivery of a successful event. The key is to match your event concept (the theme, programme, etc) with the appropriate audience (those who will attend or participate in your event). In order to do that, you must have a strong idea of what the event actually offers and to whom. You also need to have an effective plan of action and the necessary resources to implement it.

Before plunging into the planning process, it's worth taking a minute to consider the unique challenges connected with marketing an event as opposed to an ongoing activity or product. Events are, in general, special annual or one-off manifestations that take place in a specific, relatively short time-frame. You have a finite period to plan and action your marketing activity and a one-time-only chance to mount your event. Remember, attendees that you attract to your event as a result of your marketing activity are themselves key to the event's success. If you attract the right type and level of attendees, this will help create the special atmosphere and experience that the event aspires to offer, not to mention any financial or other targets that you have set.

# 1) Where to start: the situational analysis

The first stage of devising your marketing plan involves what is sometimes called the 'situational analysis'. It basically means taking a step back and having a good look at all the available information that relates to the event before devising a plan to move forward. The idea is to give you the proper context in order to make informed marketing decisions. The good news for those unfamiliar with event marketing is that if you have already conducted the basic event planning activity suggested in Chapter 1, you have already taken the first steps in carrying out the 'situational analysis'. For example, you've already:

- ▶ Established the event's 'vision', 'mission' and 'key objectives'
- ▶ Considered the Strengths, Weaknesses, Opportunities and Threats pertaining to both the event and your organisation
- ▶ Begun to formulate/refine the event's programming policy/content
- ▶ Decided when the best time to hold the event is

To develop the situational analysis further in marketing terms you should now begin to consider the following in more detail:

- ▶ **The existing audience for the event** (*i.e.* who comes, where from, how many, level of repeat attendees, level of first time attendees, has the audience profile changed over the years, etc?)
- ▶ **If there is any existing research** (*i.e.* do you hold any hard information on your audiences, have you closely examined it, what does it tell you, is it recent, what else do you need to find out, etc?)
- ▶ **Previous marketing activity and resources** (*i.e.* what has worked in the past, what could be developed further, etc?)
- ▶ **Available resources** (*i.e.* budget, staff, stakeholder support and amount of time available to deliver the plan, etc)
- ▶ **Competitor analysis** (*i.e.* does the event have any competitors, can you learn from them?)
- ▶ **Income targets** (*i.e.* what level of return does the marketing activity aim to deliver by way of ticket sales, what are the other sources of potential income and can marketing activity influence these?)

Throughout the process you should keep in mind that event marketing is never a stand alone or rigid activity. It involves working as part of the wider event team and ensuring that the marketing plan is structured yet flexible enough to respond as the event develops.

## 2) Who should devise the Marketing Plan?

The size and nature of the event will determine who feeds into the planning process and who is ultimately responsible for delivering the plan. For a small event, marketing may be one of a range of responsibilities that a single person holds, whilst a larger event may require a full marketing team with specialist skills. Whatever the requirement, responsibilities should be clearly defined. A written and developed marketing plan allows those responsible for marketing the event to communicate their plans to the wider event team, funders and partners and to seek feedback and input as appropriate. Some larger events may benefit from the formation of a 'Marketing Planning Sub-Group' made up of representatives of the various 'event partners'. This kind of group should serve to influence strategy, provide practical support and advice for the event marketing staff and ensure that all partners are fully on board with (and able to enhance) marketing plans.

## 3) Resources

When preparing your Marketing and Communications Plan you must keep the available resources at the forefront of your mind. There are three key resource factors to consider:

- ▶ **Budget** – you need to establish the basic marketing budget at the outset
- ▶ **Time** – you need to be aware of what's actually possible in the time available
- ▶ **Staff** – you need to agree who's responsible for what and identify if there are any sources of additional assistance

## 4) Identifying Target Markets

The situational analysis should have broadly identified the type of person the event is likely to attract and if there is a perceived demand or gap in the market for the event. Now, identify in detail the types of groups that you will actually spend time and money

trying to attract. This means being more specific and realistic. At this stage you need to ask yourself two key questions:

- i. **Who are the Target Markets?:** these may include previous attendees; new audiences; special interest and community groups; schools; specific age, socio-economic and ethnic groups; families, couples, tourists, future sponsors, the media, stakeholders, relevant clubs and organisations, movers and shakers, etc.
- ii. **Where are the Target Markets?:** for each entry in the WHO category you should identify WHERE they are likely to be drawn from, *i.e.* the local community, the wider region, Scotland, UK, Europe, etc.

It's always good to get ideas down on paper. In table format make a list of all the groups you believe are possible targets (WHO), and next to them list the geographic scope of each (WHERE). This is a brainstorming activity which could be undertaken with other members of your team or marketing planning group as appropriate. It will help you identify the full range of possible targets. Now prioritise these into primary and secondary markets to help you plan and apply your resources accordingly. You need to decide WHO and WHERE your targets are in order to start thinking about HOW you will reach them.

A template with sample entries is provided below to get you started.

FIGURE 11.1

Who, Where and How – Brainstorm Template			
Who	Where	How	Priority
Existing attendees	All over UK	Mailing list, website, e-bulletins, 'save the date' postcards, programme mailing, etc	Primary
Families	Local community and wider region	Posters and leaflets distributed throughout area, local radio, local press editorial and advertising, school bag inserts, etc	Primary
Special Interest	Throughout UK and Europe	Ads and editorial in specialist magazines and websites; Mailings and special offers to clubs and societies	Primary
Etc...	Etc...	Etc...	



## Building your audience

If yours is an annual or regular event, be aware that your existing audiences are one of your most important assets. At the very least you need to ensure that you are constantly building and utilising your audience database. You need to understand your current audience profile in order to maintain and develop it further. Audience data should be captured at every event and trends analysed and compared to previous years. Your existing audiences can be useful ambassadors for your event. They are important in spreading positive word-of-mouth and should be nurtured in order that they will return. In addition to that, by examining information about your current audience (where they live, what they enjoy, their family status, etc) you can begin to identify ways to expand it. In accordance with budget limitations, remember to concentrate on your existing and 'potential new audiences' and don't spend valuable time trying to convert groups that your research and experience tell you may be indifferent or unlikely to attend. The more you understand about your current and potential audiences, the more sophisticated you can become in using different techniques to target specific groups (also see Visitor Research, Chapter 12).

## 5) Forming the Marketing Objectives: Where do you want to go?

Once you have identified the key groups that make up your current and potential target markets you can begin to set clear objectives that describe what you want to achieve. Make sure your marketing objectives are **SMART** (see Chapter 1):

**S**pecific – do they describe precisely what are you aiming to achieve?

**M**easurable – can you define and measure them?

**A**chievable – do you have the resources to put them into action?

**R**ealistic – never over-estimate anything, especially financial targets

**T**imely – can you achieve them in the timeframe available?

Here's an example of what SMART marketing objectives might look like for a fictional multi-arts event that is aiming to build audiences based on a previous year's profile and performance:

- ▶ To increase the level of overall attendances by 1,000
- ▶ To attract 10,000 attendances over 2 days: 6,000 on Saturday and 4,000 on Sunday
- ▶ To increase the number of visitors attending the event from outwith the region by 300
- ▶ To raise £25,000 in net ticket revenue
- ▶ To attract 30% local, 20% regional, 40% Scottish and 10% 'rest of UK' attendees
- ▶ To attract 300 new mailing list members
- ▶ To increase 'family ticket' sales by 10%
- ▶ To achieve 95% audience satisfaction rating of 'excellent' or 'very good'
- ▶ To achieve national press coverage

Remember, marketing objectives have to make sense within the framework of the broader event objectives (see Chapter 1).

## 6) Developing the Marketing Strategy: How are you going to get there?

Once the marketing objectives have been set, begin to look at the approach you will take to achieve them. In other words, begin to define your strategy. In order to do this, first think about how the event will be positioned in the market place.

### Positioning

This is a marketing term used to describe the way in which you **present** what you are **offering** to the public. It involves communicating the 'feel' and main benefits of the event experience through 'key messages'. Each event will have its own unique range of benefits, which may include, for example:

- ▶ The reputation of the event
- ▶ The key elements of the programme
- ▶ What the special interest area is
- ▶ The kind of experience the event offers (outdoors/indoors/all day, etc)
- ▶ If there is a unique element – for example something that is specific to the town/event/venue
- ▶ If it offers something that is different/better than other events/experiences



Baxters  
848

Remember, for effective positioning you need to keep in mind **who** the main targets are and focus on **what** will appeal to these groups most strongly. Ask yourself if there should be a strengthening of the current positioning or a shift in emphasis to particular benefits or target segments?

## Marketing Mix: What makes people attend events?

Alongside effective positioning, the combination of Product, Price, Convenience and Promotion are the principal factors that are most likely to influence attendance and therefore your marketing strategy:

### Product – what the event offers

Can you develop the product any further? Things to consider:

- ▶ Are there any adjustments that should be made to the overall event to make it more appropriate or attractive to your target audiences?
- ▶ Does the programme/content need to be further developed?
- ▶ Does the venue need to be adapted or improved?
- ▶ What is the total experience? Are you offering event ‘packages’ in association with transport providers, hotels, restaurants, etc that could make the event experience more attractive and enjoyable?

### Price – the cost of attending

How does the cost of attending the event add up? If appropriate, consider:

- ▶ Is the ticket price/entry fee at the right level for target groups?
- ▶ Does the price offer value for money?
- ▶ Is there an appropriate range of ticket/entry options? Do you need to introduce family tickets or special offers for example?
- ▶ Do you need to offer any price differentials to encourage attendance at particular performances?
- ▶ Are there any additional costs (booking fees, travel, meals, accommodation, parking) that will affect decisions to attend?

### Convenience – making it easy to attend

- ▶ For ticketed events – Have you put in place the appropriate advance ticket distribution network? For example, are you using a ticket hotline, web sales, walk-up box office, ticket agencies, postal bookings, sales through local shop or library, etc?
- ▶ Do you offer various/appropriate methods of payment (e.g. credit card, cheque, cash)?
- ▶ Is the event programme appropriately timed to appeal to your targets?
- ▶ Is the event easy to get to?
- ▶ Make sure you provide the appropriate travel, accommodation and location information necessary to encourage visitors who do not know the area well.

### Promotion – saying the right things to the right people

- ▶ Communicate the positioning of the event through key messages: Who the event is aimed at; What is special about it; Why it's a good idea to attend; When will it take place; Where will it take place; How easy it is to engage with the event?
- ▶ Develop the right combination of marketing tools to reach your audience.

## 7) Marketing Tools

Once you have undertaken the above activity you should be better equipped to decide on the kinds of 'tools' (materials and actions) that you will employ to most effectively reach your target audience. There is a whole range of available options and the tools that you choose will depend on all of the above factors together with the resources (time, money and staff) that are available to you.

### Some of the most commonly used event marketing tools include:

- ▶ Print: posters, leaflets, postcards, programmes, etc
- ▶ Direct mail and print distribution
- ▶ Media advertising: print, radio and TV
- ▶ Website/internet/e-bulletins
- ▶ Outdoor advertising: billboards, bus sides, poster sites, street dressing, etc
- ▶ Friends/ambassadors' programmes/clubs
- ▶ Media releases, promotions and activity
- ▶ Media sponsorship

## Developing the Brand

Whatever tools you employ, they should be united by a consistent 'brand'. By this we mean the 'graphic identity' and 'tone of voice' that is developed for the event. This will involve the event logo, colours, image, typeface, copy and how these are brought together into unified communication materials. Things to consider:

- ▶ The brand should reflect and reinforce the desired positioning of the event.
- ▶ Think about the shelf life for the brand. Does it have the potential to adapt in future years?
- ▶ Does the brand work across the whole range of marketing tools – from posters to headed paper to website graphics for example?
- ▶ Are you creating a new brand or developing an existing one?
- ▶ How does your audience perceive the existing brand (if any)?
- ▶ Does the current brand fit with where you want to take the event?
- ▶ Does it reflect the event experience?

## Working with Graphic Designers

Cheaply produced print materials can be a false economy. Unless there is someone with strong graphic design talents on the event team, you should secure the services of a graphic designer in order to develop the brand and produce professional print materials. You may have an ongoing relationship with a designer that you trust, or you may choose to invite one or more design companies whose work you admire to pitch for the job. Either way, at the outset you should clarify what is required in the form of a design brief. Here are some pointers to get you started:

- ▶ **The design brief** should include: a short event description, overall event aims, target audiences, **SMART** marketing objectives, a comprehensive list of the range and quantities of design items required, the timeline for the sign off and delivery of each item, clarification of who is to be responsible for print management, an outline budget, any special requirements.
- ▶ Make sure that you have carefully thought through all the design elements and materials you are likely to need before **agreeing the budget**. If you don't, your costs could escalate significantly as you add additional print items to the job specification.

- ▶ **Agree copyright.** Make sure that you agree and understand which party owns the rights to the design. If it's not you, be prepared for the consequences should you want to work with a different designer and retain the logo or other graphics in the future.
- ▶ If you are working with a design agency, make sure you have **one point of contact** to ensure smooth communication.
- ▶ **Keep the designer up-to-date** with any changing deadlines and alter and agree the timetable if appropriate.
- ▶ Ensure that **all proofs are signed off** before going to print.
- ▶ Ensure that you are supplied with **digital copies** of the logo suite and key design elements in a relevant format that is compatible with your computer software. You don't want to have to go back to the designer every time there is a request or need for your logo or brand image.

## Print

There is a wide range of approaches you could take with your printed material. Think through the full range and quantity of print that you require. Think about what has worked well in the past and what will work for your range of target groups. The key is to review and revise tactics where appropriate – don't produce material just because you have always done so. Here are a few tips to help you get the best out of your print tools:

### Sponsor and Funder Logos

If your event is funded by a range of public agencies and sponsors, ensure that all your print and publications carry the agreed acknowledgements but avoid creating print that looks like it has a touch of 'logo-i-tis'. It's a good approach to devise a 'logo set' that can be used across all your print items. Try to avoid placing logos in the body of the design – it's usually a cleaner approach to place all logos together in a 'logo set' – for example in a strip at the bottom edge of the poster or on the back panel of a leaflet. Ensure that each logo has the appropriate 'breathing space' around it, that it's the required size and that the sponsor has approved its use and placement.

### Posters

- ▶ Posters serve the function of creating awareness and anticipation for the event. They can often be produced reasonably well in advance of the event because they are concerned with communicating your key messages – not the detail of your programme.



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- ▶ Your design should be eye catching, simple and bold – never overload your poster with text.
- ▶ Make sure the text, especially the event title, dates, venue and web address are clear and can be read from an appropriate distance.
- ▶ Ensure there is a contact for further information and tickets – a web address or telephone number.
- ▶ Make sure you have thought about where you will be able to display your posters – do you need to produce A4, A3, A2 or 60"x40" versions – or a mix of various sizes, for example.
- ▶ Decide on appropriate print quantities and remember to keep some posters back for dressing the venue, archive and debrief packs.
- ▶ Consider if there is an option to sell posters at the event – perhaps signed by a special guest.

### Flyers and Leaflets

Flyers and leaflets provide a different function to posters. For one thing people can pick them up and take them away with them. Therefore don't just produce 'mini posters' but provide a fuller level of information, expanding on your key messages to convert interest into attendance. Here are some tips:

- ▶ Make sure your flyers are eye-catching and interesting – something that people will stick on their pin boards rather than in the bin.
- ▶ Keep the front image simple and bold. Don't overload it with text.
- ▶ Describe in more detail the Who, What, Why, When and Where of the event in the inside and/or back of the leaflet.
- ▶ Give clear information about ticketing (include any group discounts, available concessions, etc).
- ▶ If you are aiming to attract visitors from outside the local area, a map showing the location of venues is essential.
- ▶ Make sure you have given clear travel information (or appropriate contacts) regarding nearby train stations, bus and road routes, parking, etc.
- ▶ Include any essential health and safety advice such as: no glass, no alcohol, dress warmly, not suitable for children, etc.
- ▶ Make sure you use a plain font and that the text is of a reasonable size.
- ▶ If text is to be placed over or reversed out of images make sure it remains legible.

- ▶ The 'copy' should be well written and concise. Get someone with an eye for detail to check it for inaccuracies and 'typos' before going to print.
- ▶ Think about the appropriate size of print for distribution/mailing/racks – *i.e.* A6, A5, 1/3 A4, folded, special cuts and shapes – the options are wide.
- ▶ If you are going to post some of the leaflets or flyers, make sure you can source envelopes that they will fit inside without the need to fold them.
- ▶ Never print on just one side of a flyer – this can look unprofessional and is usually a wasted opportunity.

### Printed Programmes

- ▶ Programmes should give full details of the event activities. It is likely that they will be produced only when the full programme is confirmed and they should act as a guide to the event.
- ▶ They can be distributed in advance, or at the event itself (free or for sale).
- ▶ They should include elements such as: a welcome message and word from the sponsor or any other endorsements; 'programme at a glance'; a site/orientation map with key; full programme details; sponsor information and acknowledgement; event background and images; where to get food and drink; a list of local visitor attractions, accommodation and amenities in the area; a note regarding any future sponsorship/advertising opportunities connected with the event; event mailing list and contact details; a 'credits' section.
- ▶ Don't forget that you may be able to raise advertising income by selling pages in your programme or swapping adverts with other appropriate publications.
- ▶ Bear in mind that a well produced event programme can be helpful when trying to interest future sponsors in your event.

### Tickets

Don't forget that event tickets themselves are useful communication tools. Ok, so you may have already 'captured' the customer, but tickets can still continue to work for the event in other ways.

- ▶ Make sure the tickets you produce reflect the professional level of the event, especially if tickets are sold in advance.
- ▶ Again if sold in advance, make sure that the ticket cannot be easily reproduced; if appropriate, think about using serial numbers or holograms for example. Specialist ticket companies can provide a range of appropriate options.

- ▶ Make sure that each type of ticket is easily distinguishable on collection. For example you can use colour to differentiate between full price and concession tickets. This will make ticket checking quicker and smoother on entry.
- ▶ Think about using the reverse of the ticket to draw attention to key programme elements, health and safety reminders, or consider selling it as advertising space.
- ▶ Think about other ways that the ticket might work for you. For example is it appropriate to incorporate a tear-off 'special offer voucher' or a 'prize draw' opportunity?
- ▶ The point is, don't miss a trick and be inventive with your marketing tools.

## Other Print/Design Items

Other print or design items may include VIP, launch or press invitations, headed paper, website, complimentary tickets, carrier bags, entry forms, folders, catalogues, direct mail material, sponsor packs, advert layouts, site maps, etc. It's important that you think through all the print elements that are required in the planning stages for effective use of time and budget resources.

## Printing

If you are working with a professional designer you may decide to delegate the business of working with the printer to them. Alternatively you may choose to work directly with the printer. Whatever way you manage your print production, here are some points to consider:

- ▶ Get a good price for the job. Print quotes can vary widely from supplier to supplier. The rule of thumb is to seek at least three quotes.
- ▶ Use the appropriate quality and weight of paper stock – make sure you get a sample from the printer. Inappropriately cheap print can have a negative impact on your marketing effort, whilst very high quality stock may be unnecessary.
- ▶ Set realistic timescales and make sure the printer is able to deliver to these. Allow a contingency so it's not a disaster if the print is a few days late.
- ▶ Be smart – think about the size of press that your printer is working on – can you print various items on the same stock in order to save your budget? Talk to your printer about ways to save costs – perhaps you can adjust your timescale and/or print sizes accordingly.



**If you don't  
understand  
something ask  
your designer  
or printer to  
explain...**

- ▶ Always get a colour proof and sign it off before the final print run takes place.
- ▶ Be aware of the various options open to you. Standard full colour print jobs are achieved using a mix of four inks – Cyan, Magenta, Yellow and Black (CMYK).
- ▶ ‘Mono’ (black and white) or ‘spot’ (black plus one colour) print jobs are likely to be a little cheaper than full colour. This may be a false economy though if the look they provide does not reflect your event positioning.
- ▶ Using special premixed ‘Pantone’ colours, gloss or special finishes and unusual cuts can be effective but they are likely to cost you more.
- ▶ Be aware of the different kinds of printing processes. Seek advice on the most relevant and cost-effective process for your print run – *i.e.* lithographic (good for large print runs), digital (good for limited print runs, large format and one-off jobs), screen printing (good for large format posters).
- ▶ Build your knowledge. If you don’t understand something, ask your designer or printer to explain it to you.

## Media Advertising

When considering which advertising platforms to use, think about the media that will best reach your target audience. For example daily newspapers generally have a short life but a high readership; monthly magazines have a longer shelf life and often a more targeted or specialist readership; radio can provide repeated short messages and a high market penetration; TV can appear expensive but can give your event a sense of credibility. The starting point is to identify the media that is more likely to suit your needs (and your budget) and then make contact with the various companies to request information about their readership/audience profile, reach, advertising opportunities, cost and deadlines. This information is usually available in the form of a ‘Rate Card’. Collating and understanding this information will allow you to start to build your advertising plan. This plan should incorporate all publications/stations, dates, deadlines, requirements and special notes to help you manage your advertising activity. To help you track your advertising spend and activity set up your plan in a package such as Microsoft Excel using headings such as those indicated opposite.

Advertising Plan Template							
Date of insert (list in date order)	Publication/ Media	Size & Spec	Copy Deadline	Contact	Notes/ Status	Budget	Agreed Cost
						Total	Total

### Advertising in the Printed Media

By this we mean adverts placed in publications: the local, regional or national newspapers; specialist magazines and other printed media.

- ▶ Make initial contact with the sales team of the various publications you are interested in well in advance of booking the campaign. Explain the kind of event you are promoting, find out if there are any special supplements or issues coming up that relate to the nature of your event. Ask if they offer any block booking discount schemes or deals with sister publications.
- ▶ Adverts in the printed press are usually sold by a 'per column centimetre' (p.c.c.) rate. They are also often sold by specific set sizes, (*i.e.* full page, half page, quarter page, etc).
- ▶ When buying adverts according to a p.c.c. rate, establish how wide each of the publication's columns are, decide how many columns wide and how many centimetres high you want your advert to be. To calculate the price, follow this formula:  

$$\text{Price} = (\text{number of columns wide}) \times (\text{number of centimetres high}) \times (\text{rate p.c.c.})$$
- ▶ Bear in mind that different rates are usually quoted for colour and mono adverts. If planning to place mono ads ensure that your designer has been briefed to supply mono versions of the design.
- ▶ Make sure you know where in the publication your advert will appear. Remember that different rates are usually charged for advertising in the 'classified' section as opposed to 'run of paper' (ROP). You can specify a particular page (*i.e.* the arts or front page) but make sure you ask if this involves paying a premium.
- ▶ Check when and how the publication should receive the advert 'copy'. Once you have sent your copy, check to see if it has been received or ask for confirmation of receipt.

- ▶ Always send a printed proof of your layout to avoid print error.
- ▶ Always check that your advert actually appeared. If the publication has made an error and the advert does not appear or is incomplete, negotiate a refund or an appropriate alternative placement.
- ▶ Even if your budget is extremely tight, it may be worth holding back a contingency amount so that you can take up any attractive last minute offers.
- ▶ Don't forget that if you have your own publication (event programme or brochure), you can attempt to arrange 'contra deals' with other relevant publications (special interest magazines, other event brochures) whereby you swap advertising space.
- ▶ Some publications also offer the opportunity to insert your print into their publications.

### Radio Advertising

Regional radio advertising can be a useful and cost efficient way to achieve a general high level of event awareness. Some things to consider:

- ▶ Will your key messages be adaptable to radio?
- ▶ What stations are relevant to your target markets? Think about listener profile and reach.
- ▶ Consider the programmes and time of day that your target market is most likely to be tuned into the radio.
- ▶ It's usual for the radio station to produce the advert – but they need a clear brief in order to design and script the advert effectively.
- ▶ Think about the music, the voiceover, the script – does it reflect the event positioning?
- ▶ Local radio stations are sometimes interested in broadcasting live from events. If they get involved in this way the partnership often involves a level of presenter 'talk-ups' in advance of the event. These can help to further endorse the event.

### TV Advertising

Local TV advertising may be cheaper than you think and can be effective for large scale events with wide target markets.

- ▶ Commercial regional stations often offer packages split into 'micro regions'. This can be a cost effective way of gaining blanket coverage in specific areas for events with a wide market appeal.

IF  
YOU  
DON'T  
PROMOTE

SOMETHING TERRIBLE HAPPENS

NOTHING

- ▶ The TV station will help plan the schedule according to when your targets are most likely to be watching and can produce the advert for you as part of the deal.
- ▶ If you don't have quality visuals available, do not consider this option. You may end up damaging your marketing effort if the TV ad looks cheap.

## Outdoor Advertising

Outdoor advertising is an excellent way to achieve a strong 'on the street presence'. It generally involves displaying large format posters and banners in key locations. Specialist outdoor advertising companies own and sell space across a variety of platforms including transport networks, billboards, and large city centre screens. Some outdoor advertising opportunities are owned and managed by the local council; these often include overhead banner positions and branding on street furniture (*i.e.* lampposts and display units). In addition to these formal advertising opportunities you may also identify and negotiate additional opportunities yourself, for example the use of shop windows to build a display. Here are some additional pointers:

- ▶ Have a look around your town and access routes. Identify the various outdoor advertising opportunities available; establish who is responsible for them and what the costs involved are (production and display).
- ▶ Make sure you gain permission for the placement of all posters or banners where appropriate.
- ▶ When producing outdoor banners, it's recommended that they are printed on to wind permeable/waterproof material as appropriate.

## Print Distribution

Before producing any print, do your homework and think carefully about where and how you will distribute it. For example there is little point creating A2 posters if local shops and businesses will only take A4. No matter how fantastic print may look, it is useless if it never leaves the event office. Some points to consider:

- ▶ There are professional print distribution companies that can cover the whole of the country or just your local area. They can design a distribution schedule for you based on your target audience profile and will display your print in professionally maintained racks and sites for an agreed period.

- ▶ Locally, galvanise the support of your committee or recruit extra volunteers to help distribute print. With your target audience in mind, think about areas that may be willing to display or distribute print for you free of charge. These might include: tourist information centres, local hotels and B&Bs, shops, cafés, colleges, council buildings, libraries, pubs, arts and leisure centres, theatres, doctors' surgeries, etc.
- ▶ Don't forget potential opportunities to leaflet audiences at other events or venues; think about door-to-door drops or hand-to-hand leafleting on a busy Saturday afternoon.
- ▶ Think about how event partners can help you. For example are there opportunities to insert leaflets in sponsors' mailings or do they have any public space where you could create a display or distribute leaflets, etc?

## Mailing Lists

It is essential that recurring events develop a mailing list. Capturing the details of attendees at one event in order to tell them about the next is common sense and a cost-effective way of retaining (and communicating with) audiences. Those events that sell the majority of tickets in advance through box office systems have a direct route to capturing the details of attendees. However, many events are free to enter or simply charge on the gate. Whatever your situation, ensure the capturing of audience data is a priority in your marketing planning. Here are some tips:

- ▶ Mailing lists don't have to be complicated. Only capture the information you need.
- ▶ Make sure you hold the information on a computer programme that allows you to sort the list, perform mail merges and print labels (e.g. Microsoft Access or Excel).
- ▶ Think about ways you might want to segment the list. Make sure you provide a 'field' to enter when the member joined the list along with any other appropriate information.
- ▶ When people buy tickets, ask them if they'd like to join the mailing list and be equipped to take their details – at the event have guest book or mailing list forms at the ready.
- ▶ Think about incentives – mount a prize draw or competition (e.g. "Join our Mailing List and Win..."). Set up highly visible 'stations' where people can enter.
- ▶ When conducting visitor research, offer respondents the opportunity to 'opt in' to join the mailing list.

- ▶ Always get consent. On any data capture forms include a phrase along the lines of “Your information will be used for the purposes of (company name) to let you know about future events. We will not pass your contact details on to any other organisation”.
- ▶ Make it clear the details will be stored on computer.
- ▶ Hold on to the original data forms for reference.
- ▶ Familiarise yourself with the Data Protection Act – visit [www.opsi.gov.uk](http://www.opsi.gov.uk)
- ▶ Back up your database regularly to disc.
- ▶ Keep the database live throughout the year. If speaking to someone interested in the event, ask them if they’d like to join the mailing list.
- ▶ Add a line in all your print materials giving information about how to join the mailing list.
- ▶ Keep it clean. Always include a ‘return to’ address on any mail and delete any contacts from whom mail is returned.
- ▶ Make sure you capture postcodes to assist with efficiency.

## Direct Mail

Once you have developed your mailing list, it’s important that you use it effectively. Direct Mail basically means personally addressed marketing information that you send by post to your mailing list. On a basic level you can make sure that all on the list receive general information about the event. For more sophisticated campaigns you may want to think about segmenting the list so that you can target specific groups. Some points to consider:

- ▶ Direct Mail can provide a high rate of return but the cost per unit can be high in comparison to other marketing tools.
- ▶ Send a personalised covering letter with your print. Sign it personally (in blue ink) if possible – it will look less like ‘junk mail’.
- ▶ Think about who you are writing to and outline any key benefits that you think will specifically appeal to the mailing group.
- ▶ Include a ‘call to action’. What should the person do next? Are discounts or special opportunities on offer through the mailing?
- ▶ Seek advice. Check with the Royal Mail about franking, bulk uplift levels and any ‘Mailsort’ discounts, etc that may apply to your campaign – [www.royalmail.com](http://www.royalmail.com)

**choose the  
most practical  
method of  
delivery...**



- ▶ Think about how the mailing ‘fulfilment’ will be carried out. Do you have helpers/ volunteers to assist you with stuffing envelopes? Are you using a mailing house to do this for you?
- ▶ Remember to include the addresses of some key staff members in any mailing to test delivery.

## Email

Don’t forget about email. Provide the opportunity for your mailing list to receive information electronically instead of (or as well as) by post. Some pointers:

- ▶ Email is a comparatively low cost and flexible mailing solution. You can distribute information cheaply and easily after the main printed programme is produced and right up until the last minute if necessary.
- ▶ Don’t ‘spam’ – only email those who have signed up to receive information.
- ▶ Don’t become a pest. For example a monthly or quarterly email is generally more appropriate than a weekly one and only send an email if there is something to actually say.
- ▶ Provide instructions for people to remove themselves from the email list, should they want to stop receiving information at any point.
- ▶ Always provide a link to your event website in the body of the email to facilitate an easy ‘click through’.
- ▶ It is possible to measure the effectiveness of email campaigns very closely especially if linked to website access and ticket sales.
- ▶ Think about presentation options – will you send your email in plain text or in HTML format?

## Internet

The internet is an increasingly essential marketing tool. A good event website can offer events a head start when it comes to targeting visitors from outwith the local area. Don’t fall into the trap of simply putting your leaflet or brochure information on screen though. Use the medium to build a picture of the experience, use photographs, site maps, provide information on the programme and links to other information sources, etc. Some things to consider:

- ▶ Always keep your site up to date.
- ▶ Ensure the site is easy to navigate – information should be no further than three clicks away from the home page.
- ▶ Be aware of the full costs – design, domain name, hosting and maintenance.
- ▶ The site should be appropriately designed and optimised to ensure maximum hits.
- ▶ It's essential to be able to check on user activity, *i.e.* levels of hits, referrals from other sites, direct requests, etc.
- ▶ Think about how the site will be built. Will it be designed so that you can manage the content yourself? 'Content managed' sites allow you to alter the text and images within a pre-set template whenever you like, thus offering a more dynamic communication tool.
- ▶ Has it been designed so that it can be 're-skinned' with future campaign visuals, etc.
- ▶ Can you capture mailing details and manage mailing campaigns through the site?
- ▶ If providing any links to other sites, seek the proper approvals.



### TOP TIP

Communication tools are constantly developing – make sure you keep up-to-date.

## 8) Media Relations and Planning

Your media plan should form a significant and integrated part of your marketing and communications plan. By the media we mean newspapers and magazines, radio and television stations, the internet, newsletters, bulletins and freelance journalists. You should target those that are most appropriate to your audiences. Editorial media coverage is generally more persuasive than paid for advertising and what's more, it's free. Don't expect the media to come to you though – you have to be active in communicating the event story. Here are some pointers to get you started:

- ▶ If you don't have a dedicated 'media officer' for the event, make sure someone appropriate on the team has the responsibility for co-ordinating press activity.

- ▶ Build a media database. Identify and research the key media and specialist journalists that you think may be interested in covering the event. Keep adding to the list as you identify new contacts. You may also include contacts such as your constituency politicians and stakeholders who should also receive any media releases as a matter of course to keep them in the loop.
- ▶ Be aware of deadline days and preferred format (email or post) for receiving media releases and images.
- ▶ Keep a track of media response and interest.
- ▶ Create a good relationship with the local paper and appropriate journalists.
- ▶ Think about angles and sell the story: can you offer programme exclusives, interviews, photo opportunities, previews to particular journalists?
- ▶ Always be accurate and honest when dealing with the media – there is no point overdressing a story. You will lose their trust if they feel they have been misled.
- ▶ Provide appropriate accreditation and facilities for the media to report from the event. Facilities may include: a press room with internet connection, computer, phone, refreshments, etc.
- ▶ Remember to invite journalists to review the event.
- ▶ Always say “thank you” if the event is covered.

## The Media Action Plan

Build a media action plan plotting intended media activity against a timeline, taking in the pre, ‘live’ and post event periods. Your plan may include the release of the following:

- ▶ **Long Lead Information** – this is outline event information sent for the attention of selected ‘future planning diaries’ of newspapers, magazines, TV and radio stations as appropriate. The aim is to create an awareness highlighting any potential the event has to provide content for future features. Remember to embargo information where appropriate.
- ▶ **Listings Release** – this is basic copy that should be sent to the listings editors of appropriate publications. Prepare a short release with all key contact information. Remember listings are usually around 100 words in length so make sure you keep it to the point. You may have to circulate these to some quarterly or monthly publications in advance of your press launch as these publications often have long lead times.

- ▶ **Press Launch Release** – circulated when you formally announce the details of the event: confirmed dates, venue, key programme messages, sponsors, etc. It is usual that there is some kind of special launch activity planned in conjunction with this. The main thrust of your marketing campaign activity would also usually launch from this date forwards.
- ▶ **Special Interest Stories and Features** – you should look to interest different publications with different story angles to build momentum for the event as it builds towards the big day.
- ▶ **Photo Opportunities** – think about how to sell your event in pictures. Come up with interesting visual angles and try to interest the appropriate newspaper photo desks.
- ▶ **Pre Event Release** – this is a general release, acting as a reminder and providing full details about the day and any last minute updates.
- ▶ **Post Event Release** – this release should be sent by email/fax at the close of the event. It's a useful approach to write a couple of different scenario releases prior to the event and then tailor the most appropriate one to fit. Getting these releases out quickly is important. Ensure you are set up to email/fax your releases from the event site or venue. Once the event has been over for a couple of days, it's old news.
- ▶ **Crisis Management** – ensure you have considered the various risks associated with the event. Prepare a range of scenario responses and identify media spokespersons as appropriate.





## Writing a Media Release

Here are some basic tips to help you write a simple media release.

- ▶ Use headed paper
- ▶ Type Media Release on the top
- ▶ Type the date of issue
- ▶ State if the information is for immediate release or if it is embargoed until a certain date
- ▶ Use a strong, clear, attention grabbing (but relevant) title
- ▶ Add an explanatory sub title if it needs it
- ▶ Type in double line spacing and leave wide margins
- ▶ In the first paragraph make sure you cover the What, Where, Why When and Who – put the most important information first and make it snappy
- ▶ Expand and add depth to the story in the next couple of paragraphs, but keep it to the point
- ▶ Use quotes from the event director or funders as appropriate
- ▶ Try to keep it to one page, and no more than two
- ▶ Type 'Ends' at the end
- ▶ Include any key facts and further information such as ticket information, opening times, a list of all funders under 'Notes to Editors'
- ▶ Always include details of the event press officer/contact for further information – name, company, phone number and email address
- ▶ State if images are available and in what format

## Press Cuttings

If your budget allows it, it's a good idea to engage a press cuttings agency to monitor press coverage – especially if yours is an event that is likely to attract coverage beyond your local area. Usually a retainer is paid for the required period along with a charge per cutting. Ensure that your agency is fully briefed and advised of your press activity.

## Photographs

It is essential to have good photographs of your event. If your budget allows it, engage a professional photographer; if it doesn't, make sure you nominate a photographer from the event team. Prior to the event, put together a comprehensive list of all the shots you would like to have. Think about future marketing and branding as well as site planning uses and don't forget to get shots featuring prominent sponsor branding. Unless you agree otherwise, the photographer holds the copyright of images even

though you have commissioned the work. It's a good approach to aim for an agreement whereby the images are supplied to you digitally with the agreement that they can be used for the future promotion of the event. In this scenario photographers should always be credited.

## Other Considerations

- ▶ **Presentation Ceremonies** – The majority of sports events will include a presentation ceremony after the match or competition. Agree the format of the ceremony and advise the teams and officials in advance, giving consideration to any tradition and if/how the media are involved with photos or interviews.
- ▶ **VIPs/HRH Attendance and Protocol** – If you have invited royalty or other VIPs to your event, make sure you and your team are aware of the appropriate protocol. Consider in advance how you might get them involved and include this in the brief you send them. Involvement could include opening the event, an interview/photo call with the media, presentation of prizes or just simply being there.
- ▶ **Event Results** – Consider how you'll communicate the results of your event/competition to those who are not attending the event. Websites and daily press releases to the media are the most popular communication methods and sometimes result sheets are available during the event for attendees. It's also worth considering setting up a mailing list for people to submit their email addresses to receive the latest event news.



### TOP TIP

At the start of your campaign, identify the range of photographs and graphics that you intend to use to promote the event. Size them appropriately, save them as jpegs, number them, and create a corresponding credit sheet. You could also create image CDs for press packs. This will save you time in the long run and allow you to quickly email/post images on request.

## 9) Marketing Plan Template

Now you have done most of the brainwork, here's a template to help you communicate and formalise your plan.

FIGURE 11.5

<b>Front Page</b>
▶ Event name, dates, venue
▶ Use event logo
▶ Date of version of plan
▶ Plan author
<b>Event Introduction</b>
▶ Provide a general outline of the event. State the dates, venues, times, etc
<b>Project Background</b>
▶ Stakeholders and partners
▶ Brief event history and outline of overall event objectives
<b>Situational Analysis</b>
▶ Outline previous event research and evaluation information
▶ Present the SWOT Analysis
▶ Outline any key information drawn from the Competitor Analysis
<b>Target Audiences</b>
▶ Outline profile of current audience
▶ Outline profile of new potential audiences
<b>SMART Marketing Objectives</b>
▶ State the specific, measurable, achievable, realistic and time-based marketing objectives
<b>The Marketing Strategy Positioning and Key Messages</b>
▶ Describe how you will position the event
▶ State key messages
<b>The Marketing Mix</b>
▶ Give an outline of the direction of the campaign with regards Product, Price, Convenience and Promotion
<b>Marketing Tools and Tactics</b>
▶ Give a description of the tools to be used, what audience they will reach and the objectives they will work towards
▶ Identify the resources (budget, staff and time) required to undertake each activity
▶ It may be useful to present the Marketing Tools and Tactics in a table like the one opposite:

## Marketing Tools and Tactics Template

Tool/Tactic	Description	Target Groups	Timing	Monitor by	Objective	Responsible	Budget
i.e. Event Website	New Content Managed site	All, Focus on potential short break visitors, Media	Work starts in Jan. To be complete and tested in time for launch	Web hits, additions to e-database, feedback and online ticket sales	Increase level of first time attendees from outside region	Marketing Manager	£5,000
Etc...							
							£TOTAL

### Marketing Action Plan (see template on next page – Figure 11.6)

- ▶ The plan should show planned activity against months/weeks as appropriate and should act as a handy prompt as you go through the campaign. It is useful if you can insert it into the overall Event Action Plan for cross reference with other event management actions
- ▶ Additional, more detailed plans are likely to be required for various elements such as advertising (see Figure 11.2)

### Budget and Resources

- ▶ Plan how you will finance and resource the campaign
- ▶ Provide a detailed marketing budget showing all expenditure (ensure it relates to the overall budget)
- ▶ Outline the staffing/volunteer requirement

### Research and Evaluation

- ▶ Describe how you will monitor the success of the plan prior, during and after the event  
What checks will you employ?
- ▶ Describe any visitor research that you intend to undertake







chapter twelve  
**visitor research**



**How can you develop and grow your event audience if you don't know anything about it? Building a picture of who attended the event, where they came from, how they found out about it, what they enjoyed and if they will return is essential when developing marketing strategies. In addition, if your event is funded by public money or commercial sponsorship it is likely that this kind of information will be required as a condition of support – and often you'll need it to make your case in the first place.**

Research needn't be a complicated, expensive or scary undertaking. The key is to focus on what you actually want to find out (*i.e.* what is the research question?). Next, ask yourself if the skills required to carry out the research exist 'in-house' or if you need to commission an external organisation or consultant. Bear in mind that the result of 'independent research' is generally thought to be more reliable by external parties than that carried out by the organisation itself. Professional consultancy is worth considering but if your budget is too tight and you don't have the necessary 'in-house' skills think about approaching a local college or university. Relevant departments may be able to incorporate the project into student's coursework under the guidance of their lecturer.

If you plan to undertake or commission the research yourself, make sure you seek appropriate advice to ensure that your methodology and questionnaire will provide reliable results. Some things to think about:

- ▶ What do you want to find out and why?
- ▶ Who will use the information (e.g. yourself and the management team, funders, sponsors, etc)?

- ▶ What research has been done already?
- ▶ Is there any secondary data that could inform your research? (Note: 'primary data' is your own data collected from attendees, individuals, groups, etc; 'secondary data' is data collected by someone else e.g. population statistics, etc).
- ▶ What methodology will you use to collect the data? (Think about sample size and reliability).
- ▶ Sample size – the statistical principles informing probability calculations are outwith the remit of this book. However, as a rule of thumb, the sample should be no less than 100 and there's often little need to exceed 500 (of course depending on the size and range of the event).
- ▶ Reliability of sample – how will the sample be drawn and will it provide a balanced representation of the audience?
- ▶ Closed questions provide 'quantitative' data – *i.e.* information that you can count and easily process 'in-house'. This includes numbers and percentages of attendance, demographics, patterns of attendance, etc.
- ▶ Open questions provide 'qualitative' data – *i.e.* information that elicits more personal responses, yet can be difficult to process and interpret 'in-house'. This includes opinions, thoughts and recommendations.

The most common way to find out about event audiences is to carry out face-to-face interviews or self-completion questionnaires at the event itself. To give you an example, below is a basic questionnaire designed to be implemented 'face-to-face'. **WARNING:** your questionnaire should be specific to your research question and situation – it is not suggested that the following questionnaire format is appropriate to your event.

Time of Interview: \_\_\_\_\_ Date of Interview: \_\_\_\_\_

Interviewer Name: \_\_\_\_\_

Enter prompt – "Hello, my name is..., I work for the [insert name] event. Can you spare 5 minutes to help us develop the event further? All respondents will be entered into a prize drawn to win [insert prize]."

**1. Where do you live? (please tick)**

- |  |                                     |  |
|--|-------------------------------------|--|
| <input type="checkbox"/> [insert host town] – go to Q6         | <input type="checkbox"/> England    | <input type="checkbox"/> Overseas (please state) _____ |
| <input type="checkbox"/> Other [insert host region] – go to Q6 | <input type="checkbox"/> Wales      |  |
| <input type="checkbox"/> Other Scotland                        | <input type="checkbox"/> N. Ireland | Please state your postcode: _____                      |

**2. Is the Festival the main reason for your visit to (state town) today?**

- Yes?    No?

**3. Describe the nature of your visit**

- I'm a day visitor (i.e. returning home today) – go to Q6  
 I'm on holiday

**4. If on holiday, tell us about your holiday length and type**

a) State the number of nights: \_\_\_\_

b) State where you are staying (tick):

- (insert host town)    Other (insert host region)    Other Scotland

c) State type of accommodation (tick):

- B&B/Guest House    Hotel    Self catering    Camping    Friends and family

**5. If on holiday, did the festival play a part in your decision to holiday in this area?**

- Yes    No

**6. Tell us about your party/group**

a) Including yourself, how many adults are in your party:

M \_\_\_\_ F \_\_\_\_

b) How many children (under 16s) are in your party:

M \_\_\_\_ F \_\_\_\_

c) Who is in your group?

- Friends    Family    Work colleagues    Other

d) What age are you?

- 17–24    25–34    35–44    45–54    55–64    65+

e) Gender of respondent (don't ask!, just tick):

- Male    Female

**7. How much do you estimate that your PARTY has spent in total today on**

Event admission fees   £ \_\_\_\_ . \_\_\_\_   Shopping and gifts   £ \_\_\_\_ . \_\_\_\_

Food and drink   £ \_\_\_\_ . \_\_\_\_   Other local activities   £ \_\_\_\_ . \_\_\_\_

**8. How did you travel to the festival today? (tick all that apply)**

- On foot    Hired car    Train  
 Cycled    Chartered coach    Bus  
 Private car    Ferry    Air  
 Other, please specify \_\_\_\_\_

**9. How did you hear about the festival (tick all that apply)**

- Newspaper advertising    Newspaper editorial    TV  
 Magazine advertising    Magazine editorial    Internet search/links  
 Distribution racks    Posters    Festival website  
 Mailing    Radio    Tourist office  
 Word of mouth

**10. Attendance Patterns**

How many times have you attended previously? (circle)   0   1   2   3   4   5   6

Would you like to return to the event?

- Yes    No

Would you return to the area for a visit or holiday?

- Yes    No    I live here

Will you recommend the festival to friends and family?

- Yes    No

**11. Tell us how you rate the festival in respect of the following (please tick)**

	Excellent	Very Good	Good	Average	Poor	Very Poor	N/A
1. Overall festival experience	<input type="checkbox"/>						
2. Management	<input type="checkbox"/>						
3. Programme	<input type="checkbox"/>						
4. Advance publicity	<input type="checkbox"/>						
5. Venue	<input type="checkbox"/>						
6. Time of year	<input type="checkbox"/>						
7. Activities for kids	<input type="checkbox"/>						
8. Value for money	<input type="checkbox"/>						
9. Ticketing	<input type="checkbox"/>						
10. Catering/food	<input type="checkbox"/>						
10. Information at the event	<input type="checkbox"/>						

**12. Any other comments:**

All respondents will be entered into a PRIZE DRAW to win XXXXX. Please supply your details to enter.

Name:

Address:

Postcode:

Tel:

Email:

If you would like to receive information about next year's event you can opt in to our Mailing List. Your information will not be passed on to any other organisation and you will only receive information about this event (tick):  Yes  No Thanks



# Some More Research Tips

## General

- ▶ The offer of a Prize Draw can be a useful inducement for respondents to take part.
- ▶ Don't miss a trick: offer all respondents the opportunity to join the event's mailing list in order that they can be kept up-to-date with future programme announcements and offers, etc.
- ▶ Take care over the layout of the questionnaire. For clarity, number questions, use tick boxes as appropriate and leave enough space for any required responses to be stated.
- ▶ Leave any personal questions to the end of the questionnaire (e.g. age range, contact details, profession, etc) – some respondents may be put off if they are asked to answer such questions at the outset.
- ▶ Ensure that you do not pose 'leading questions'.
- ▶ Ensure that you structure your questionnaire to avoid confused responses. For example, if you are directing some of the questions specifically to visitors to the region, ensure that locals are directed to bypass these questions.
- ▶ Make sure you do a test run. Always pilot the questionnaire on a few friends and colleagues to ensure that it's easy to complete and doesn't contain any errors or misleading questions. Before you carry out the research ensure that you have thoroughly addressed how the data will be processed. Test your sample responses on the software that you will use to process the data.

## For interview-led questionnaires

- ▶ Ensure that your interviewers are fully briefed, well-presented and very polite.
- ▶ Provide event tee-shirts and/or identity badges for each interviewer to wear so that they can be easily identified.
- ▶ Think about where interviewers will be situated within the event site/venue. Attendees should not be approached on entry.
- ▶ Don't start the interviewing until at least an hour or more into the event – otherwise event attendees may not have had the necessary event experience to provide valid responses.
- ▶ Think about how you will reach your intended sample size – give the interviewers targets so that they know how many interviews per hour they are aiming for.

- ▶ Make sure that there is a safe place where all completed questionnaires can be stored throughout the event.
- ▶ Ensure you have plenty of blank questionnaires ready.

## For self-completion questionnaires

- ▶ Think about timing. When and where will attendees be offered the opportunity to take part – remember you want to maximise reliable responses. Is it appropriate to place the questionnaires on venue seats or in participant packs; should questionnaires be distributed during an interval, in the café area, on exit, etc; should you set up specific ‘research stations’ across the event site where attendees can take part?
- ▶ Think about ease of response. Do you need to provide large, well-marked boxes around the event site/venue for questionnaires to be returned; should you provide an envelope with a freepost address?
- ▶ Ensure you have plenty of pens available.



### TOP TIP

Remember, at the very minimum you should be thinking about where your audience/participants come from – a simple request for a postcode at the time of booking, or via a competition mechanism, can provide essential demographic information in terms of the pull of the event and the success of the marketing.



chapter thirteen  
**post event**



## **It's not over yet. The final step in the event management process is one of good business practice and good housekeeping and our advice is to start it as soon as possible after the event.**

The evaluation and reporting process, mainly involving de-brief meetings, information gathering and report writing, is an important and useful exercise which:

- ▶ Allows everybody who was involved in the event to feedback their experiences, advice, and recommendations
- ▶ Helps you to realistically assess the event's success based on factual and anecdotal information
- ▶ Provides you with the opportunity to 'sign off' the event (physically and emotionally)
- ▶ Helps you plan the next event

### **Meetings**

You may feel by this stage that you have had enough meetings but it's important to have your say and let everybody else do likewise. The nature, size and structure of the event will have an influence on how many meetings you have but it is likely you will require to meet with:

- ▶ Your organisation's management team and temporary/part-time staff
- ▶ Key external contractors
- ▶ Your client (if you have one)
- ▶ Steering-group and management sub-groups
- ▶ Funders and sponsors of the event

Take note of the key points, observations, advice and recommendations that people offer – positive and negative – to be included in your final de-brief report. At these meetings it is important to be objective and to be able to take constructive criticism along with the praise. Encourage people to speak freely and honestly and do the same yourself.

## De-brief Reporting

Ask your own management team members to prepare succinct and constructive de-brief reports detailing their role in the event, their experiences (and that of the people who were in their team) and recommendations for future events. This will help you when it comes to writing the final report.

Like the Business Plan, a de-brief report is a very useful document. It will serve as a single, clear record of the event and its outcomes. You will refer to it time and again when planning future events and so it should include all relevant information such as:

- ▶ General reminder of the type of event, programme, dates, location(s), how many people attended, etc
- ▶ General statement about the success of the event
- ▶ Review of the Business Plan, its objectives and actions – were they achieved?
- ▶ Who was involved in the planning and operations of the event and what their roles were including information on the steering-group and any sub-groups
- ▶ Overview of the programme and ancillary attractions
- ▶ Reminder of production and health and safety aspects
- ▶ Detailed analysis of the effectiveness of marketing and communications including a reminder of the marketing tools employed, media activity, press clippings, audience breakdown, market research, strengths and weaknesses of the campaign, etc
- ▶ Fundraising analysis measured against your initial revenue plan
- ▶ Final budget showing all income and expenditure
- ▶ Recommendations for each area covered by the de-brief report (you can make recommendations at the end of each section or wait until the end of the report)
- ▶ Summary and conclusion

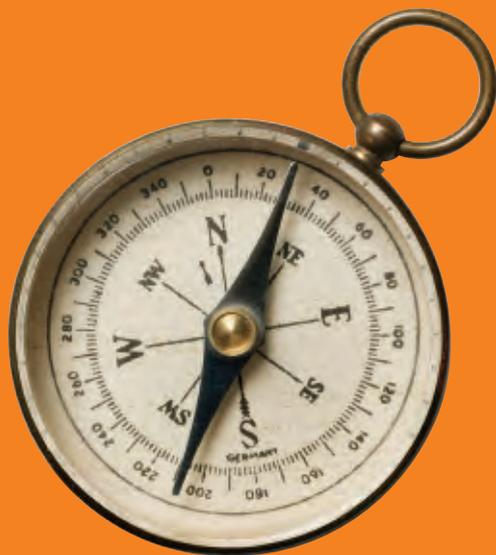
The circulation of the report may or may not be as extensive as other documentation you have prepared for the event. In general, those who have been intrinsic in the event planning process and those with an interest in the future of the event such as your client, funders and key management personnel would receive a copy of the report.

Other than that, before you get around to planning for the next event, you will have many other tasks to perform such as writing thank you letters, making final payments to staff, artists and subcontractors and final invoicing to funders, etc. The post event period can be a busy time but it will be time well spent in the long run.

## Planning for the Next Event

By now it's likely plans for the next event are already in their early stages. The de-brief process helps you organise your thoughts on what has just happened and what to do next.

Take time to reflect on everything that has taken place; try to think about the event planning process and the event itself from an objective viewpoint. Go back and look at your original Business Plan. Review and update the plan based on the knowledge you have gained and the actual outcomes.



appendix  
**useful contacts  
and resources**



**Below is a limited list of contacts and resources that you may find useful. The list is ordered alphabetically with quick reference symbols indicating the nature of each organisation.**

## KEY

● RESOURCE/ADVICE ● ARTS SPECIFIC ● SPORTS SPECIFIC ● FUNDING

### Arts & Business Scotland



6 Randolph Crescent  
Edinburgh EH3 7TH

0131 220 2499  
scotland@aandb.org.uk  
www.aandb.org.uk/scotland

Arts and Business is a UK organisation that aims to help build communities by developing creative partnerships between business and the arts.

### Arts and Humanities Research Council (AHRC)



Whitefriars  
Lewins Mead  
Bristol BS1 2AE

0117 987 6500  
www.ahrc.ac.uk

The Arts and Humanities Research Council supports research within a huge subject domain from traditional humanities subjects, such as history, modern languages and English literature, to the creative and performing arts.

### Arts Marketing Association (AMA)



7a Clifton Court  
Clifton Road  
Cambridge CB1 7BN

01223 578078  
info@a-m-a.co.uk  
www.a-m-a.co.uk

The AMA is the professional development body open to all arts professionals involved in bringing arts and audiences together in the UK and internationally.

### Arts Research Digest



www.arts-research-digest.com

Arts Research Digest provides a unique overview of recent and current research in the arts, media and cultural sectors around the world.

### Audiences Europe Network



c/o Audiences Yorkshire  
3 St Peters Buildings  
St Peters Square  
Leeds LS9 8AH

01904 766935  
info@audienceeurope.net  
www.audienceeurope.net

AEN is the first European network that focuses on audience development.

### Awards for All



4th Floor  
1 Atlantic Quay  
1 Robertson Street  
Glasgow G2 8JB

0141 242 1400  
scotland@awardsforall.org.uk  
www.awardsforall.org.uk/scotland

Awards for All Scotland is supported by the Scottish Arts Council, the Heritage Lottery Fund, sportscotland and the Big Lottery Fund. It awards grants for art, sport, heritage and community activities, and projects that promote education, the environment and health in the local community.

**BECTU Scotland** 

150 Brand Street  
Glasgow G51 1DH

0141 314 0060

[pmcmanus@bectu.org.uk](mailto:pmcmanus@bectu.org.uk)

[mmcgreyev@bectu.org.uk](mailto:mmcgreyev@bectu.org.uk)

[www.bectu.org.uk](http://www.bectu.org.uk)

BECTU is the independent union for those working in broadcasting, film, theatre, entertainment, leisure, interactive media and allied areas who are primarily based in the United Kingdom. The union represents permanently employed, contract and freelance workers within these sectors.

**Big Lottery Fund** 

1 Atlantic Quay  
1 Robertson Street  
Glasgow G2 8JB

0141 242 1400

[enquiries.scotland@biglotteryfund.org.uk](mailto:enquiries.scotland@biglotteryfund.org.uk)

[www.community-fund.org.uk](http://www.community-fund.org.uk)

The Big Lottery Fund in Scotland distributes half of all the lottery funding available for Scotland. It makes grants – big and small – to tackle disadvantage and to help regenerate the communities which are most in need.

**British and International Federation of Festivals for Music, Dance and Speech** 

Festivals House  
198 Park Lane  
Macclesfield SK11 6UD

0870 7744 290

[julia@festivals.demon.co.uk](mailto:julia@festivals.demon.co.uk)

[www.festivals.demon.co.uk](http://www.festivals.demon.co.uk)

The organisation represents the interests of the amateur festival movement.

**British Arts Festivals Association** 

2nd Floor  
28 Charing Cross Road  
London WC2H 0DB

020 7240 4532

[info@artsfestivals.co.uk](mailto:info@artsfestivals.co.uk)

[www.artsfestivals.co.uk](http://www.artsfestivals.co.uk)

BAFA is a meeting point of arts festivals in the UK, providing information and a professional network for the festivals movement.

**British Council Scotland** 

The Tun, 3rd Floor  
4 Jackson's Entry  
Holyrood Road  
Edinburgh EH8 8PJ

0131 524 5700

[scotland.enquiries@britishcouncil.org](mailto:scotland.enquiries@britishcouncil.org)

[www.britishcouncil.org/scotland](http://www.britishcouncil.org/scotland)

The British Council is the UK's international organisation for educational opportunities and cultural relations. The Scottish branch aims to enhance Scotland's international reputation and contribute to building an internationally-oriented, outward-looking Scotland.

**British Red Cross** 

4 Nasmyth Place  
Hillington  
Glasgow G52 4PR

0141 891 4000

[www.redcross.org.uk](http://www.redcross.org.uk)

Part of the British Red Cross activity includes the provision of first aid training and first aid cover at hundreds of public events. Local office contacts available via the website.

**Business Gateway** 

Scottish Enterprise  
Small Business Services  
150 Broomyland  
Glasgow G2 8LU

0845 609 6611

[network.help@scotnet.co.uk](mailto:network.help@scotnet.co.uk)

[www.bgateway.com](http://www.bgateway.com)

Business Gateway offers start up information, support and advice to people who are interested in running their own business.

**Business Link** 

0845 600 9006

[www.businesslink.gov.uk](http://www.businesslink.gov.uk)

Central site providing practical advice for Business.

**Central Council of  
Physical Recreation (CCPR)**



Francis House  
Francis Street  
London SW1P 1DE  
020 7854 8500  
info@ccpr.org.uk  
www.ccpr.org.uk

The CCPR is the representative body for National Sports Organisations.

**Centre for Cultural Policy Research**



Gilmorehill Centre  
9 University Avenue  
University of Glasgow  
Glasgow G12 8QQ  
0141 330 3806  
culturalpolicy@arts.gla.ac.uk  
www.culturalpolicy.arts.gla.ac.uk

The centre maintains and develops the Impact database on behalf of the Scottish Executive. The database contains details of research concerning the social and economic impact of the arts, culture and major events.

**Children 1st**



www.children1st.org.uk  
Royal Scottish Society for Prevention of Cruelty to Children. The website provides information about the Child Protection in Sport Project.

**Companies House**



0131 535 5800  
jhenderson@companieshouse.gov.uk  
www.companieshouse.co.uk  
Companies House is an Executive Agency of the United Kingdom Government Department of Trade and Industry (DTI). All limited companies in Great Britain are registered with Companies House and file specific details as required by the Companies Act 1985. The telephone and email details given are those for the separate user group in Scotland.

**COSLA**



Rosebery House  
9 Haymarket Terrace  
Edinburgh EH12 5XZ

0131 474 9200  
enquiries@cosla.gov.uk  
www.cosla.gov.uk

COSLA, the Convention of Scottish Local Authorities, is the representative voice of Scottish local government. Links to all Scottish Local Authority websites can be found on the website.

**Creative Entrepreneurs Club**



The Lighthouse  
11 Mitchell Lane  
Glasgow G1 3NU  
0141 225 8424  
cec@thelighthouse.co.uk  
www.creativeentrepreneurs.com

The Creative Entrepreneurs Club offers a unique way for people in the Creative Industries to keep up-to-date with the sector and the issues that affect it. It provides a forum for discussion and the cultivation of contacts.

**Creative Exchange**



Development House  
56–64 Leonard Street  
London EC2A 4JX  
020 7065 0980  
info@creativexchange.org  
www.creativexchange.org

Creative Exchange is a network connecting people and organisations all over the world – from the grassroots to the UN – who are working with arts and culture to achieve social development. It is also an information centre which collects, stores and distributes information.

**Cultural Enterprise Office**



CCA  
350 Sauchiehall Street  
Glasgow G2 3JD  
0844 544 9990  
info@culturalenterpriseoffice.co.uk  
www.culturalenterpriseoffice.co.uk

Scotland's specialist Business Development Service for creative and cultural practitioners and micro businesses. The service currently operates in Glasgow, Aberdeen, Dundee and Edinburgh.

**Culturebase.net**

[www.culturebase.net](http://www.culturebase.net)

Culturebase.net is a unique online information source on contemporary international artists, cultural practitioners and experts from all fields. The website contains profiles of over 1000 individuals and groups from all regions of the world and it continues to grow.

**Department of Culture, Media and Sport (DCMS)**

2-4 Cockspur Street  
London SW1Y 5DH

020 7211 6200  
[enquiries@culture.gov.uk](mailto:enquiries@culture.gov.uk)  
[www.culture.gov.uk](http://www.culture.gov.uk)

The DCMS aims to improve the quality of life for all through cultural and sporting activities, to support the pursuit of excellence and to champion the tourism, creative and leisure industries.

**Department of Trade and Industry**

0845 600 9006 (business link)  
[www.dti.gov.uk](http://www.dti.gov.uk)

The Department of Trade and Industry plays a vital role, creating the conditions for business success; and helping the UK respond to the challenge of globalisation.

**Disclosure Scotland**

PO Box 250  
Glasgow G51 1YU  
0870 609 6006  
[www.disclosurescotland.co.uk](http://www.disclosurescotland.co.uk)

Disclosure Scotland provides an accurate and responsive disclosure service to enhance security, public safety and protect the vulnerable in society.

**eFestivals.co.uk**

[www.efestivals.co.uk](http://www.efestivals.co.uk)

Festivals news, info, tickets, reviews and photos.

**Equal Opportunities Commission Scotland**

St Stephens House  
279 Bath Street  
Glasgow G2 4JL

0845 601 5901  
[scotland@eoc.org.uk](mailto:scotland@eoc.org.uk)  
[www.eoc.org.uk](http://www.eoc.org.uk)

The Equal Opportunities Commission provides information and advice, campaigns on issues of sex equality, supports legal cases, spreads best practise and promotes equality.

**Equity**

114 Union Street  
Upper St Martings Lane  
Glasgow G1 3QQ

0141 248 2472  
[igilchrist@glasgow.equity.org.uk](mailto:igilchrist@glasgow.equity.org.uk)  
[www.equity.org.uk](http://www.equity.org.uk)

National artists' union.

**EUROPA – the European Union On-Line**

[www.europa.eu.int/index\\_en.htm](http://www.europa.eu.int/index_en.htm)

This website provides a gateway to a whole range of European Union information including links to cultural sites, news, activities, institutions and documents.

**EventScotland**

5th Floor  
Ocean Point One  
94 Ocean Drive  
Edinburgh EH6 6JH

0131 472 2313  
[info@eventscotland.org](mailto:info@eventscotland.org)  
[www.eventscotland.org](http://www.eventscotland.org)

Scotland's National Events Agency with a vision to make Scotland one of the world's foremost events destinations by 2015.

**Federation of Scottish Theatre**

c/o Theatre Workshop  
34 Hamilton Place  
Edinburgh EH3 5AX

0131 220 6393  
[fst@scottishtheatre.org](mailto:fst@scottishtheatre.org)  
[www.scottishtheatre.org](http://www.scottishtheatre.org)

The membership organisation for the professional theatre sector in Scotland.

### Forestry Commission Scotland

Silvan House  
231 Corstorphine Road  
Edinburgh EH12 7AT

0845 3673787  
fscotland@forestry.gsi.gov.uk  
www.forestry.gov.uk/scotland

The Forestry Commission's mission is to protect and expand Scotland's forests and woodlands and increase their value to society and the environment.



### Glasgow Grows Audiences Ltd

Suite 1/1  
6 Dixon Street  
Glasgow G1 4AX

0141 248 6864  
info@gga4arts.co.uk  
www.gga4arts.co.uk

Do you want to know more about the Glasgow arts scene, how it ticks and what the audience thinks? GGA, Glasgow's specialist arts marketing and audience development agency is dedicated to helping you find out.



### Health & Safety Executive Books

[www.hsebooks.com/Books/](http://www.hsebooks.com/Books/)

Health & Safety Executive publication resource.  
Available items include 'The Event Safety Guide'.



### Health & Safety Executive Scotland

HSE Infoline: 0845 345 0055  
[www.hse.gov.uk/scotland/index.htm](http://www.hse.gov.uk/scotland/index.htm)

The aim of this site is to provide information on the work of the Health and Safety Executive and its partners in delivering higher standards of workplace health and safety in Scotland.



### Heritage Lottery Fund

28 Thistle Street  
Edinburgh EH2 1EN

0131 225 9450  
scotland@hlf.org.uk  
www.hlf.org.uk

The Heritage Lottery Fund (HLF) enables communities to celebrate, look after and learn more about our diverse heritage.



### HI-Arts

Ballantyne House  
84 Academy Street  
Inverness IV1 1LU

01463 717 091  
info@hi-arts.co.uk  
www.hi-arts.co.uk

HI-Arts is the arts development agency for the North of Scotland and the Islands.



### Highlands and Islands Enterprise (HIE)

Cowan House  
Inverness Retail and Business Park  
Inverness IV2 7GF

01463 234 171  
hie.general@hient.co.uk  
www.hie.co.uk

The Highlands and Islands of Scotland has around 19,000 businesses, more than 435,000 individuals with skills and potential of their own – and more than 8,000 voluntary and community groups. The task of the Highlands and Islands Enterprise (HIE) network is to unlock that potential and help create a strong, diverse and sustainable economy.



### Historic Scotland

0131 668 8600  
[www.historic-scotland.gov.uk](http://www.historic-scotland.gov.uk)

Historic Scotland safeguards the nation's historic environment and promotes its understanding and enjoyment.



### HM Revenue and Customs

0845 010 9000 (helpline)  
[www.hmrc.gov.uk](http://www.hmrc.gov.uk)

For information about Customs, Excise, VAT or any other HMRC taxes or duties call the helpline or visit the website.



### Incident Contact Centre (ICC)

[www.riddor.gov.uk](http://www.riddor.gov.uk)

The ICC is a joint venture by the HSE, COSLA and Local Government Associations (LGA). It provides a central point for employers to report incidents irrespective of whether their business is HSE or Local Authority enforced.



**Inland Revenue Charities** 

Meldrum House  
15 Drumsheugh Gardens  
Edinburgh EH3 7UL

0845 3020203  
[www.hmrc.gov.uk/charities](http://www.hmrc.gov.uk/charities)

The HMRC charities pages are intended to provide you with a one stop shop for information and questions about tax issues relating to charities, charitable donations, CASCs and VAT reliefs for disabled people.

**Institute of Leisure and Amenity Management (ILAM)** 

ILAM House  
Lower Basildon  
Reading RG8 9NE

01491 874800  
[info@ilam.co.uk](mailto:info@ilam.co.uk)  
[www.ilam.co.uk](http://www.ilam.co.uk)

The professional body for the leisure industry. Represents the interests of leisure managers across all sectors and specialisms of leisure.

**Institute of Sport and Recreation Management (ISRM)** 

Sir John Beckwith Centre for Sport  
Loughborough University  
Loughborough  
Leics LE11 3TU

01509 226474  
[info@ism.co.uk](mailto:info@ism.co.uk)  
[www.isrm.co.uk](http://www.isrm.co.uk)

The Institute exists to advance and promote public health through the provision of education, training and advancing medical and other sciences and technologies and by encouraging active participation in sport and other recreational activities.

**Intellectual Property** 

[www.intellectual-property.gov.uk](http://www.intellectual-property.gov.uk)

A government-supported site with information and guidance on the various aspects of intellectual property including copyright, patents and trade marks.

**ISAN** **(International Street Arts Network)**

[info@streetartsnetwork.org.uk](mailto:info@streetartsnetwork.org.uk)  
[www.streetartsnetwork.org.uk](http://www.streetartsnetwork.org.uk)

ISAN is an independent group of presenters and promoters of street arts throughout the UK working to develop the art form through networking, information sharing, collaboration, lobbying, training and advocacy.

**Musicians' Union (MU)** 

11 Sandyford Place  
Glasgow G3 7NB

0141 248 3723  
[glasgow@musicianunion.org.uk](mailto:glasgow@musicianunion.org.uk)  
[www.musiciansunion.org.uk](http://www.musiciansunion.org.uk)

Information about the union and its services.

**National Association for Sports Development (NASD)** 

PO Box 105  
Glossop SK13 6WP

01457 868666  
[answers@nasd.uk.com](mailto:answers@nasd.uk.com)  
[www.nasd.org.uk](http://www.nasd.org.uk)

The NASD provides support, advocacy and professional development for those involved in the development of sport.

**National Disability Arts Forum** 

[www.ndaf.org](http://www.ndaf.org)

National Disability Arts Forum has established ARTS ACCESS UK, an online searchable access guide to arts venues throughout the country. The web pages are due to go online as soon as enough data has been collected.

**National Trust for Scotland** 

Wemyss House  
28 Charlotte Square  
Edinburgh EH2 4ET

0131 243 9300  
[information@nts.org.uk](mailto:information@nts.org.uk)  
[www.nts.org.uk](http://www.nts.org.uk)

The National Trust for Scotland is the conservation charity that protects and promotes Scotland's natural and cultural heritage for present and future generations to enjoy.

### NESTA

Fishmongers' Chambers  
110 Upper Thames Street  
London EC4R 3TW

020 7645 950  
nesta@neste.org.uk  
www.neste.org.uk

NESTA, the National Endowment for Science, Technology and the Arts, is working to transform the UK's capacity for innovation.



### Office of the Scottish Charity Regulator

2nd Floor  
Quadrant House  
9 Riverside Drive  
Dundee DD1 4NY

01382 220446  
info@oscr.org.uk  
www.oscr.org.uk

OSCR is the independent regulator and registrar of Scottish Charities.



### On the Move: the performing arts traveller's toolkit

www.on-the-move.org

A web site dedicated to information about international activities, projects and their funding, in the areas of theatre, dance, music and other performing arts disciplines. It is intended for artists and performing arts professionals from the European Union and its surrounding countries.



### Performing Right Society

www.prs.co.uk

The PRS collects and distributes licence fees for the public performance and broadcast of musical works.



### Production Services Association

PO Box 2709  
Bath BA1 3YS  
01225 332668  
gm@psa.org.uk  
www.psa.org.uk

Production Services Association is an association representing the professional interests of both freelance



individuals and companies serving the live entertainment and events industry.

### Scottish Arts Council

12 Manor Place  
Edinburgh EH3 7DD

0131 226 6051  
help.desk@scottisharts.org.uk  
www.scottisharts.org.uk

The Scottish Arts Council is the lead body for the funding, development and advocacy of the arts in Scotland



### Scottish Council for Voluntary Organisations

Head Office  
Mansfield Traquair Centre  
15 Mansfield Place  
Edinburgh EH3 6BB

0131 556 3882  
enquiries@scvo.org.uk  
www.scvo.org.uk

The Scottish Council for Voluntary Organisations is the national body representing the voluntary sector. It seeks to advance the values and shared interests of the voluntary sector by fostering co-operation, promoting best practice and delivering sustainable services.



### Scottish Disability Sport (SDS)

Caledonia House  
South Gyle  
Edinburgh EH12 9DQ

0131 317 1130  
admin@scottishdisabilitysport.com  
www.scottishdisabilitysport.com

SDS is the governing and co-ordinating body of all sports for people with a disability.



### Scottish Enterprise

5 Atlantic Quay  
150 Broomielaw  
Glasgow G2 8LU

0141 248 2700  
www.scottish-enterprise.com

Scottish Enterprise is Scotland's main economic development agency, funded by the Scottish Executive. The main website provides links to regional offices.



**Scottish Executive** 

[www.scotland.gov.uk](http://www.scotland.gov.uk)

The official website of the Scottish Executive. Includes specific pages on Arts & Culture, Sport and Tourism.

**Scottish Natural Heritage** 

Edinburgh EH6 5NP

0131 447 4784

[enquiries@snh.gov.uk](mailto:enquiries@snh.gov.uk)

[www.snh.org.uk](http://www.snh.org.uk)

SNH aims to secure the conservation and enhancement of Scotland's unique and precious natural heritage – the wildlife, the habitats and the landscapes which have evolved in Scotland through the long partnership between people and nature.

**Scottish Outdoor Access Code** 

01738 458545

[www.outdooraccess-scotland.com](http://www.outdooraccess-scotland.com)

To order a copy of the Code please email [pubs@snh.gov.uk](mailto:pubs@snh.gov.uk)

The Scottish Outdoor Access Code provides detailed guidance on the responsibilities of those exercising access rights to land and inland waters.

**Scottish Screen** 

249 West George Street  
Glasgow G2 4QE

0141 302 1700

[info@scottishscreen.com](mailto:info@scottishscreen.com)

[www.scottishscreen.com](http://www.scottishscreen.com)

Scottish Screen is the national body for the promotion of film culture and of the film and television industry in Scotland.

**Scottish Sports Association (SSA)** 

Caledonia House  
South Gyle  
Edinburgh EH12 9DQ

0131 339 8785

[www.scottishsportsassociation.org.uk](http://www.scottishsportsassociation.org.uk)

The SSA represents the interests of governing bodies of sport in Scotland. SSA's primary commitment is the development of positive consultation between its

members and the Scottish Parliament, key agencies and voluntary organisations on key policy issues.

**Security Industry Association** 

[www.the-sia.org.uk/home/scotland](http://www.the-sia.org.uk/home/scotland)

The SIA delivers regulation of the security industry. SIA licensing will be extended to cover Scotland in 2007.

**Showmen's Guild** 

Scottish Section  
8 Fitzroy Place  
Glasgow G3 7RH

0141 221 7297

[showmens@guildscotland.fsnet.co.uk](mailto:showmens@guildscotland.fsnet.co.uk)

[www.showmensguild.com](http://www.showmensguild.com)

The Scottish section of the representative body for travelling showmen.

**sportcal** 

[www.sportcal.com](http://www.sportcal.com)

Widely recognised as the leading website for the global sports industry providing the most up-to-date and comprehensive information available, including news and data on sports broadcasting, sponsorship and events worldwide.

**sportscotland** 

Caledonia House  
South Gyle  
Edinburgh EH12 9DQ

0131 317 7200

[library@sportscotland.org.uk](mailto:library@sportscotland.org.uk)

[www.sportscotland.org.uk](http://www.sportscotland.org.uk)

**sportscotland** is the national body for sport development in Scotland. Its goal is to see more people participating in sport and enjoying its benefits.

**Sportsmatch Scotland** 

c/o **sportscotland**  
Caledonia House  
South Gyle  
Edinburgh EH12 9DQ

0131 317 7200

[www.sportscotland.org.uk/SiteNavigation/Funding/TopicNavigation/Sportsmatch/Sportsmatch.htm](http://www.sportscotland.org.uk/SiteNavigation/Funding/TopicNavigation/Sportsmatch/Sportsmatch.htm)

Sportsmatch is an award scheme that supports grass roots projects that encourage participation at a community level, especially youth groups. Sportsmatch is funded by the Scottish Executive and administered by **sportscotland**.

### St Andrew's First Aid



National HQ  
St Andrews House  
48 Milton Street  
Glasgow G4 0HR

0141 332 4031  
[www.firstaid.org.uk](http://www.firstaid.org.uk)

St Andrew's First Aid is a charity and provider of first aid training, services and supplies. Provides first aid services to help ensure the safety of the public at local and national events from gala days and village fêtes to international sporting fixtures and major music festivals.

### The Audience Business (TAB)



50 George Street  
Edinburgh EH2 2LE

0131 243 1430  
[info@tab.org.uk](mailto:info@tab.org.uk)  
[www.tab.org.uk](http://www.tab.org.uk)

Audience development agency. The Audience Business aims to help develop audiences for the arts in and around Edinburgh, for the mutual benefit and enjoyment of local communities, visitors and arts organisations.

### Traditional Music and Song Association of Scotland (TMSA)



95–97 St Leonards's Street  
Edinburgh EH8 9QY

0131 667 558  
[office@tmsa.org.uk](mailto:office@tmsa.org.uk)  
[www.tmsa.org.uk](http://www.tmsa.org.uk)

The TMSA was established in 1966 to promote, present and preserve the traditional music and song heritage of Scotland.

### UK Sport



40 Bernard Street  
London WC1N 1ST  
020 7211 5100  
[info@uksport.gov.uk](mailto:info@uksport.gov.uk)  
[www.uksport.gov.uk](http://www.uksport.gov.uk)

UK Sport works in partnership with sports councils and other agencies to lead sport in the UK to world-class success.

### Virtual Festivals



[www.virtual-festivals.com](http://www.virtual-festivals.com)

Music festival information & listings.

### Visiting Arts



Bloomsbury House  
74–77 Great Russell Street  
London WC1B 3D

0207 291 1601  
[information@visitingarts.org.uk](mailto:information@visitingarts.org.uk)  
[www.visitingarts.org.uk](http://www.visitingarts.org.uk)

Visiting Arts is the national agency for promoting the flow of international arts into the UK and developing related cultural links abroad to help build cultural awareness and positive cultural relations.

### VisitScotland Challenge Fund



01224 288 840  
[challengefund@visitscotland.com](mailto:challengefund@visitscotland.com)  
[www.scotexchange.net/challenge\\_fund](http://www.scotexchange.net/challenge_fund)

The VisitScotland Challenge Fund is designed to assist collaborative group marketing projects that attract more visitors to Scotland and make it easier for them to book their visit. The Fund enables groups of tourism businesses to extend current marketing activity or test a new market or activity which could bring additional visitors.

### VisitScotland



Ocean Point One  
94 Ocean Drive  
Leith  
Edinburgh EH6 6JH

0131 472 2222  
[www.visitscotland.com](http://www.visitscotland.com) (consumer site)  
[www.visitscotland.org](http://www.visitscotland.org) (industry site)

VisitScotland is Scotland's national tourism agency. VisitScotland.com provides guides, information on transport, accommodation, activities and more. VisitScotland.org is the corporate site for VisitScotland. It also holds resources for everyone involved in the tourism industry.

**Voluntary Arts Scotland** ● ● ● ●

54 Manor Place  
Edinburgh EH3 7EG

0131 225 735  
info@vascotland.org.uk  
www.voluntaryarts.org

Voluntary Arts Scotland seeks to promote participation in the arts and crafts by supporting the development of the voluntary arts sector.

**Volunteer Centre Network Scotland** ● ● ● ●

www.volunteerscotland.info  
Scotland's gateway to volunteering.

**Volunteer Development Scotland** ● ● ● ●

Stirling Enterprise Park  
Stirling FK7 7RP

01786 479593  
information@vds.org.uk  
www.vds.org.uk

Volunteer Development Scotland works strategically and in partnership to promote, support and develop volunteering in Scotland.

**World of Events** ● ● ● ●

www.worldofevents.net

Information for event industry professionals, educators, students and researchers.

**Youth Sport Trust (YST)** ● ● ● ●

Sir John Beckwith Centre for Sport  
Loughborough University  
Loughborough  
Leics LE11 3TU

01509 226600  
info@youthsporttrust.org  
www.youthsporttrust.org

The YST mission is to support the education and development of all young people through physical education and sport.

## Photo Credits

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<b>Edinburgh's Hogmanay</b>



## Notes

EventScotland™

5th Floor, Ocean Point One  
94 Ocean Drive  
Edinburgh EH6 6JH

Email: [info@eventscotland.org](mailto:info@eventscotland.org)

Tel: +44 (0)131 472 2313

[www.eventscotland.org](http://www.eventscotland.org)