

creative volunteering *no limits*

A Regional Arts Australia Initiative

Carry Out Business Planning
Develop Funds & Resources
Undertake Marketing
Network Within Communities
Plan & Program Events
Work with Collections

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Museums Australia

Volunteering Australia

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Regional Arts Australia

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Foreword

Creative volunteering

We are pleased to welcome you to the Creative Volunteering Project.

This project, jointly funded by the Department of Family and Community Services (FaCS) and the Department of Communications, Information Technology and the Arts, has been two years in the making.

Regional Arts Australia has administered this project, which will offer six one-day workshops in over 60 locations across regional Australia. The workshops will reach up to 15,000 of the cultural volunteers who keep our regional museums and galleries open, help our regional theatre companies reach opening night and organise our rich and diverse regional festivals.

Volunteerism has always been a cherished Australian quality, a quality that has helped build the communities that are home to the one in three Australians who live outside the metropolitan areas.

In times of crisis, volunteers have kept the bush fire brigades going and the tea urns boiling. In times of plenty and prosperity volunteers have helped make our regions as culturally sophisticated and engaging as our cities.

We are pleased to be able to offer something back to these communities in the form of specialised training in order to extract maximum benefit from the efforts of regional volunteers.

The workshops offered under the Creative Volunteering project address needs identified by volunteers themselves—collections management, business planning, networking, marketing, planning and programming events, and funding and sponsorship.

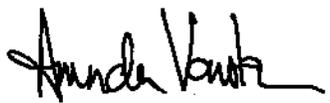
This program is tailored to meet the needs the regions have identified as most urgent. It will deliver the skills and expertise that will help regional Australia preserve its past, engage with the present and imagine the future.

The Government has been pleased to work with Regional Arts Australia on this important project.

We look forward to seeing a new professionalism and confidence among regional volunteers as they take advantage of the opportunity to hone their skills and apply new strategies to their institutions.



Senator the Hon. Rod Kemp
Minister for the Arts



Senator the Hon. Amanda Vanstone.
Minister for Family and Community Services

Foreword

Regional Arts Australia

Regional Arts Australia is proud to support sustainable, industry relevant training and professional development across regional Australia.

Regional Arts Australia is a peak national organisation for the ongoing development of the arts across regional Australia. Regional Arts Australia advocates at a local, state and federal level to ensure that the arts across regional Australia are appropriately recognised and resourced. In early 2001, Regional Arts Australia gained national funding support from the Commonwealth Government to develop and deliver skills based workshops to regionally based volunteers across Australia.

Regional Arts Australia recognises that communities throughout Australia depend on volunteers to keep huge numbers of organisations and activities afloat. This is particularly so in the case of the arts, cultural heritage and museums which are mostly managed and run by volunteers, enriching both the communities in which they live and work, and in fact, the whole of Australia. Well over a third of all people living in the regions are volunteering their time and expertise in some way for the benefit of their communities.

This workbook is one of six that has been produced as part of a **Course in Creative Volunteering**. Consultation with interested parties, including most notably Museums Australia, has contributed to the development of this nationally recognised course, now available to regionally based volunteers across Australia.

The course comprises six one day workshops which have been designed to increase the recognition and skill base of volunteers. In this present day environment of increasingly complex negotiations and arrangements, volunteers can increase their knowledge and skills about:

- Planning for business development
- Marketing planning to help to build markets in the regions.
- Establishing and maintaining networks within and across communities.
- Funding and resources for the operation of programs and activities.
- Planning and programming local events.
- Working with collections.

The support of the Commonwealth Government has made it possible for us to deliver to regional Australia the right tools for training to help volunteers gain valuable skills in carrying out their work, and importantly, to have these skills recognised.

On behalf of Regional Arts Australia I am sure that the many volunteers working across regional Australia will find this workbook a valuable resource for themselves and their organisations.

Have fun at the workshops and enjoy sharing the knowledge to secure a sustainable and viable future for arts and culture.



Nicola Downer
President, Regional Arts Australia

Overview of the workbook

This workbook is part of a series of workbooks that form the Creative Volunteering program. It is designed to be used at the workshop, and later, as a resource tool for you and your organisation. It contains information and exercises that will assist you in the management of your organisation and in your own learning.

How to use this workbook

The Plan and Program Events workbook will take you step by step through each stage of what you need to know to organise an event within your community.

Contact information is included for you to find additional help after the workshop.

A case study is provided for you to refer to as you go through the topics. The case study is introduced in the first topic and is developed throughout the workbook so that you have a concrete example to work with.

Your facilitator will take you through each section step by step, discussing the case study and then invite you to complete each stage of the planning process in the Event Planning assessment template at the back of the workbook.

Work at your own pace

The workbook has been designed for you to work at your own pace. If you do not have all the information to finish a topic during the workshop, attempt part of it and then move on to the next topic with the workshop group. You can fill in the blank sections when you return to your organisation and you are able to find the information.

As you gather information after the workshop, further stages may be completed with your organisation. When all sections have been completed, you will have gained an understanding of event planning and management. You will have the building blocks for an event plan for your organisation.

For any planning exercise to be truly successful it should be a process that involves many people in the organisation.

After this workshop, you may wish to organise an event planning session with other members of your organisation, using this workbook as a guide.

Using the exercises

These exercises are important for recording your progress as you study and can be used to demonstrate your understanding of the topics. Some of the exercises will be completed in the workshop, others you can complete on your own or with other members of your organisation after the workshop.

If you are seeking formal assessment of this module you will need to make sure that each of the exercises in your workbook is signed and dated by the facilitator of the workshop. Your facilitator will give you further information about this.

Guidelines for Learning

The workshop space

The workshop space is a safe learning environment that is structured to allow you to experiment, ask questions, make mistakes and be proud of your achievements. Don't be afraid to ask if you don't understand. A workshop is non-competitive and participants are encouraged to work with each other. Everything you need to know will be explained to you.

Flexible learning

It is important that you are able to understand, record and retain information during the workshop. If you need to work in an alternative way, you must let the facilitator know so that you can be supported to do so. For instance, if you need things to be read to you, then you could be paired with another learner who can do this with you. This will remain confidential.

Privacy protection

Workshop opportunities will allow you to share information and ideas with other volunteers from your area. This local area knowledge is especially useful when it comes to managing not-for-profit organisations. Sharing information is an act of trust, and requires everyone to agree that what you share for the purposes of learning, will not be used out of context or divulged to others who were not at the workshops. Please respect each other's commitment to sharing.

Evaluation

At the end of today's workshop you will be asked to fill out an evaluation form on the workshop. Information on the forms remains confidential and individual responses cannot be personally identified. Your views on the workshops will help us to make sure that the project is meeting its goals.

Skills audit

Everyone has valuable skills and knowledge gained throughout life that can be used for the benefit of the organisations you work with as a volunteer. This is what you bring with you to the workshop. Often people are unaware that the skills they have gained throughout their lifetime, either at work or in the home, may be of value to their organisation. For example, organising the family budget teaches invaluable budgeting skills.

This exercise is to assist you to list the skills you can offer your organisation in planning, programming and running events. Write down everything you can think of that could be related to this topic.

What are your current interests? eg movies, gardening, internet, quilting

Can you organise tasks and set priorities? eg family budget, farm management

What skills do you have? eg great with children, carpentry, cooking, storytelling

What equipment can you operate? eg computer, typewriter, calculator, fax

What office skills do you have? eg keyboarding, filing, book-keeping, calculating

What are you really good at?

List any training/courses you would like to undertake:

Topic 1: Event Design

In Topic 1, we look at:

- how to identify and determine the Core Values of an event and why this is an important step in ensuring the initial and continuing success of an event
- the principles of event design; how they can be applied to an event and how they can increase the value of your event
- methods of programming activity and entertainment at an event.

What is an Event?

There are as many definitions of events as there are kinds of events staged. While tourism and funding authorities may categorise events into 'hallmark' events (e.g. Sydney Olympics) or 'major' events (e.g. Adelaide Festival), the majority of events fall outside of these categories and almost always are 'special' to those that are involved with them.

Events can be held indoors in purpose-built venues such as theatres and galleries, or outdoors in places where all the infrastructure and equipment has to be brought in. This workbook concentrates on outdoor events, because they require additional planning. The principles and planning techniques we cover today also apply to smaller indoor events.

In the last decade, the number of events that are staged across Australia has grown dramatically and the competition for audiences ('markets') has intensified. How to position an event so that it stands out from the pack becomes a major priority for the event manager. Sometimes this can be achieved by clever marketing.

The best events are those that are consciously designed with ceremony and ritual – not just planned – and that is what makes those events unique, special and, most importantly, successful.

A special event is:

“a unique moment in time celebrated with ceremony and ritual to satisfy specific needs”.

Goldbatt, 2001. *The International Dictionary of Event Management*, Wiley and Sons.

Activity

There are many different kinds of events.

What kinds of events are held in your community?

Why An Event?

There are many possible answers to this question. They are often related to public relations and marketing goals of an organisation, as the following list of reasons for holding events shows.

An event can:

- promote a product or service, create brand awareness, launch a product or activity, generate publicity, establish top-of-mind awareness
- link your product or service with a fashion, a trend, an innovation, a heritage or an institutional or community activity
- establish your exclusivity or your accessibility
- be the strongest tool of your marketing strategy
- be an important fundraising tool
- is a great way to launch an exhibition
- celebrate important occasions in your community
- be used as an incentive for staff or clients or both
- be a more focused way of impacting on your core market
- generate goodwill toward your organisation
- broaden your support base within the community
- boost your membership
- provide quality time with your members, supporters, audience or workers
- generate enormous word-of-mouth publicity within your industry or with the general public or media
- provide a link between your customers and you
- influence attitudes towards your organisation, its products, services and people
- create an aura of excitement and can display your products or services to their optimum
- bring people with a common interest or goal together to both share the event and build rapport and a cross-fertilisation of ideas

(Adapted from 'Event Marketing' in *Australian Professional Marketing* September 1993).

Activity

Which of above reasons are relevant to your organisation or event?

What other reasons do you have for holding events in your organisation or community?

Case Study

In this workbook we use a hypothetical case study to help you work through the exercises.

Case study - Annual fair

Ashworth Fair is held on the third Sunday in May each year. It is planned, organised and delivered by community committees, who draw their membership from a wide range of organisations based in Ashworth.

It features local arts, crafts and a range of produce from the region and children's activities. The money raised from the fair goes to support community projects such as new services for elderly residents and computers for the school.

It has been running with moderate success for fifteen years, but numbers and profits have levelled off. The central committee has decided to review the whole festival.

Increasing numbers of tourists are visiting the region around Ashworth, and the committee believes there is an opportunity to increase the income raised for their community projects by attracting some of these visitors as well as boosting attendance from the surrounding region.

Core Values

The first steps in effective event design are to determine the core values of the event. You must be very clear about these so that you can make informed decisions about every aspect of the event.

Too often, events are undertaken with little or no real planning. Someone comes up with a great idea for an event and almost immediately venues are booked, dates are set and the operational logistics of the event are set in motion. History – and recent event experience - tells us that many of these events will fail to succeed in the long term. You need to plan for success.

You may have encountered the terms, Mission Statement, Objectives and Strategies. These are discussed in the Business Planning module in this workshop series. For any event things can be simplified by answering 4 questions about the event you are proposing.

Why? – why are you holding or thinking of this event?

Who? – who is the event for? Who is your ‘target market’?
Who are your stakeholders?

What? – what will happen at your event?

Want? – what do you want to achieve, what measurable outcomes do you want?

To determine the core values for an event you need to gather together some key people who are involved with the event or the idea and **brainstorm**. Some guidelines for brainstorming are on the next page. We will practice some brainstorming techniques in this workshop. This is an ideal tool for you to use within your organisation to generate ideas.

At the end of your event brainstorming session, make sure that you have one (or at the most two) clear answers for each of the questions that everyone agrees on. Make sure that your event core values are consistent with the main purpose, values and direction of your organisation (or your mission and objectives if you have them).

Once these core values are decided upon, every subsequent decision you make about your event must be made based on these core values. In that way your event will have a clear direction and your event team will be working with a common purpose.

Topic 1: Event Design

Case Study - Ashworth Fair Committee decided its core values were:

Why are we holding this event?

- To raise money for projects that will benefit the Ashworth community and the surrounding region.
- Raise the profile of Ashworth as a tourism destination.

Who is this event for?

Our fair is for: Our community

Our target markets include:

- Residents of the town and region
- Visitors to the region
- People interested in arts, music, drama and regional produce

Our stakeholders include:

- The organisations for whom we are raising money (eg school and hospital)
- The organisations who will help organise the fair
- All volunteers
- Artists of all sorts
- Local theatre company and music group
- Existing and potential sponsors
- Local government
- Local businesses
- Local produce suppliers

What will happen at our event?

- The fair will be held during the day at the Ashworth Oval
- Musical and dramatic performances will be featured during the day, culminating in a musical theatre piece in the evening.
- There will be visual arts and crafts shows, local history displays
- Local produce will be featured in food and wine stalls

What do we want to achieve?

We want to:

- Raise \$50,000 to be shared equally between aged care services and the high school
- Attract 1,000 people to Ashworth who live outside the region
- Gain media coverage in the regional and metropolitan press (not quantifiable)
-

Exercise 1

Event Core Values

(see page 46)

In the Event Planning Template on page 45, write the name of an event you are planning or have held.

Then write the core values for this event.



Guidelines for Brainstorming

No more than ten people in the session

If you have more people ask them to work in smaller groups. Five to six per group is ideal.

Pre-circulate the topic

Pre-list ideas, possible sources of inspiration or information and any idea 'triggers' you can think of. A good way to start off the topic is to use the phrase "In what ways might we..."

No negativity or criticism of ideas allowed

No judgement of ideas can be expressed - not even judgement of your own. Judgement and evaluation must be performed in a completely separate session.

All kinds of freewheeling and fun are encouraged

The crazier the ideas thrown up the better. While crazy ideas don't always work in isolation, they often provide the stepping-stone needed to leap to an otherwise unreachable concept.

Combining and improving on ideas is encouraged

When this happens it is to be written down as a new idea.

Everything that is said must be written down

Nothing may be withdrawn or erased. Any alteration should be considered an additional item. Write down everything exactly as it is said. Minimise the chance of distorting ideas by changing words or summarising. Using paper rather than white boards is preferable.

The written record should be visible to everyone in the group

It is a good idea to use tape to stick the sheets of paper filled with ideas to the walls for all to see.

Everyone taking part is equal

In brainstorming there can be no hierarchy or any association with day to day roles.

The session should have a strict time limit

Around 15 – 20 minutes seems to work well.

Each session should have a chairperson or facilitator

It is the facilitator's or chairperson's job to see the rules are adhered to and introduce creative stimuli should the group's creativity wane. The facilitator should also bring things together at the end of the session.

Adapted from McIlvena, M. & Brown S., 2001. *The Next Big Thing*, Visible Management, Adelaide

Topic 1: Event Design

Design Principles

Designing an event is simple. Everyone designs things on a daily basis without thinking about it. You choose the clothes that you wear, the position of that picture on the wall, the colour of your car (or hair!). The important thing to remember is to think about design when you are putting an event together and use the design principles in this workbook to improve your event.

Design principles that should be applied to any event are:

- **Scale**
- **Shape**
- **Focus**
- **Timing**
- **Build**
- **The Next Big Thing – where to next?**

Design Principle	Case Study
<p>Scale – Does the scale of your activity match the scale of the venue or the audience you have in mind?</p> <p>Often this is a resource issue. For large scale events audiences can be quite some distance from the action and when funds are limited it is just not possible to throw up a few giant video screens so that your audience can see close up.</p> <p>If you are planning a small event with a likely audience of 100, it's better to have a venue that will look full, rather than using a large venue that seats 600.</p>	<p>The Ashworth Fair daytime program is on the Ashworth Oval. Estimated audience is 10,000. Two stages will be set up at opposite ends of the oval so that there is constant entertainment. Stalls, food and other activities will be arranged in groups.</p> <p><i>Muriel's Wedding</i> will be held in the Performing Arts Centre, which seats 700.</p>
<p>Shape – People quite often behave and react to different shaped spaces in a subconscious and instinctive manner.</p> <p>Strong clean lines, symmetry and a sense of enclosure can all improve the experience for your audience without costing an extra cent.</p> <p>Make sure that everyone can see, and that people can move easily around your exhibition or venue.</p>	<p>Food stalls and art and craft stalls will be arranged in two semi-circles.</p> <p>The art exhibition in the Show Hall is set out with wide aisles so that art works can be seen easily and wheelchairs have access.</p>

Topic 1: Event Design

<p>Focus – People respond instinctively to colours, movement and intensity of light. Think through carefully how you can harness these to your advantage.</p>	<p>The Fair committee decided to seek expert advice on colours and lighting for the outdoor events. The Performing Arts Centre production team were brought in to discuss the effects wanted for <i>Muriel's Wedding</i>.</p>
<p>Timing – How will your event fit in with the regional or State Event Calendar? If you clash with another event likely to appeal to your target markets, you'll be wise to change the date. Are there other events (eg such as Children's Week) that you might link with to boost your event program, funding and audiences. Work around regional seasonal cycles of weather and important activities such as harvest. See p.16 for more.</p>	<p>The third weekend in May is a long weekend in this State. The weather is still mild during the day, but it can get cold at night. The Ashworth region is a popular tourism destination on this weekend. The crops in this region are harvested in December and January, so the volunteer workforce has had time to gather energy for the event.</p>
<p>Build – Every event has its own unique 'perfect event curve' that can be observed that maximises audience experience over the duration of the event. Events need to have moments of excitement, and times to be calmer. Always finish on a high!</p>	<p>Musicians playing during the day will include a popular rock group, blues, Indian and Spanish music. Music will alternate with dance. <i>Muriel's Wedding</i> musical will be the finale. The committee will consult the event manager on the structure of the program.</p>
<p>The Next Big Thing – If your event is going to run more than once, think about how to make it 'bigger and better' next time without necessarily spending a fortune. Design is the key - not dollars.</p>	<p><i>Muriel's Wedding</i> is the Next Big Thing planned for the Fair.</p>

Activity

What could you devise as the Next Big Thing at your event? Discuss this with your organisation.

Case Study

The Ashworth Fair usually finished with a school drama production in the Town Hall. This year they decided to stage a musical production of *Muriel's Wedding* in the Performing Arts Centre as their finale. They also decided to engage a professional events manager to help them stage the fair events during the day so that the program and production would achieve maximum effect.

Programming

Programming an event is relatively easy. The process starts during the “What?” part of determining your Core Values. You need to keep your vision wide – there will be plenty of reasons why your vision will be narrowed later, but for now dream and let your imagination run free. A really useful way of thinking about program elements for your event is to look at a **theme** that runs through the whole event.

It is useful to remember that program elements can be loosely divided into two main categories:

- **Active** – these build the day.
- **Passive (or Static)** – these are ‘also on’.

There are no hard and fast rules about what is or isn’t active or passive. However, the one rule is that when programming activity over a day or a number of hours, you need to make sure that there is continuous active program and not use passive elements to cover any gaps (eg between two acts on the main stage). Passive elements are just “also on” they are not the core program and will not hold the attention of your audience fully or help build the day.

Case Study – Program elements

Ashworth Fair committee decided their program elements would include:

Active elements - day

Opening ceremony
Bands alternating between Stages 1 and 2
Dance

Active elements - Night

Muriel’s wedding

Passive elements

Buskers
Face painting
Puppets
Childrens fantasy tent
Food and wine stalls
Arts and crafts

Once you decide on your program elements, you need to think about finding the best way of presenting them and how you can best resource them.

Use the design principles to think through how you can strengthen each program element. They are repeated again here for ease of reference:

- Scale
- Shape
- Focus
- Timing
- Build
- The Next Big Thing – where to next?

Activity

What program elements can you develop for your event?

Timing

Just how long *is* 30 seconds? When you are programming and planning, be aware that 30 seconds of event time is like 5 minutes of any other time.¹ Perceptively, event time is very different from real time. When programming activities at your event it is important to understand those differences.

Sitting in a dentist's waiting room with the sounds of drilling for 5 minutes will seem a whole lot longer than sitting on a beach relaxing in the sun! "Time flies, when you are having fun" is an old maxim that contains more than a grain of truth! You need to allow for this psychological response or tolerance that your audience has for various activities.

When programming an event, make sure you have a strong **Active** program of activity and support it with **Passive** (or Static) activity but don't rely on Passive program to hold your audience.

Tolerances differ according to the activity. A rough guide might be:

Speeches	2 to 3 minutes
Dance	5-10 minutes
Music	10-20 minutes
Nothing	0 tolerance!

Obviously if you are presenting a ballet then the tolerance to dance is longer than 10 minutes, but for multi-activity or art form programs keep these in mind.

The general rule is: **Short, sharp and shiny!**

Nail the timing of your event to the last second. Be really tough on things happening when they are scheduled to do so. It might seem like a paradox, but if you program very tightly to begin with the event will appear to be more spontaneous and you will be able to deal with the unexpected and remain flexible. If you are "flexible" from the start the event will soon be running itself, out of your control, and appear messy and confused to your audience.²

Timetabling

Once you are happy with each element of your program, put them together in some form of timetable or order that will make sense to your audience and also build and lead to the Next Big Thing.

Remember:

- Passive elements can run throughout your event
- Active elements build during the event
- If you have more than one area of activity, make sure that sound won't carry from one activity to another
- Make sure there are no gaps in the Active program
- Keep the audience focussed, but remember the event curve – audiences need "down" time
- Maximise your resources by using elements on their own (solo) once and then in combinations with other elements. Never use the same "effect" twice as a solo

Topic 1: Event Design

- Leave the best till last
- Leave the audience wanting more
- Be on time all the time

Exercise 2

Program Elements

(turn to page 47)

Develop one active and one passive program element, assessing it against at least one of the design principles. In the Event Planning Template on page 46, write each of these elements and your comments on the design principle against which you have assessed it.



When you are planning your event with other members of your organisation, you can expand on the work you have begun in this workshop.

Activity

Observe traffic flow

Next time you attend an event or public activity (e.g. the local shopping centre); observe the movement of the 'audience'. Which way do they go and why do they go that particular way? Draw an audience traffic flow map of the location you are observing and think about how you could change the flow of traffic.

¹ and ² - © McIlvena, M., Brown S., 2001. The Next Big Thing, Visible Management

Find out more...

- You can find out a lot about design by talking to your local art or drama teacher, keen amateur or professional photographer or painter and by checking your local library.
- The Australia Council has a wide range of resources available on its website at www.ozco.gov.au
- Special Events Magazine has a website full of event ideas and resources, go to www.specialevents.com
- Using any of the search engines and keying in "special events" or "events" will bring up hundreds of event related sites and resources.

Topic 2: Event Planning Tools

In this topic we look at:

- how to build checklists for your event
- the use of checklists in planning and managing an event and
- how to create a 'blueprint' or pattern for an event

Building a Checklist

Even simple events can get quite complex. The amount of detail you need to be able to retain at any one time can be daunting. One way of making sure information doesn't get lost or forgotten is to set up a 'blueprint' for your event. Blueprinting has a number of benefits. It:

- Reduces the amount of information you need to keep in your head and therefore reduces stress
- Establishes a 'corporate memory' for the event so if you get run over by that bus the event can be picked up and managed successfully by someone else
- Reduces the work the second time around for an event
- Helps identify problems before they arise
- Acts as a base blueprint for any other event you ever work on

Powerful results yet the method is so simple! It starts with brainstorming a checklist of every thing you can think of that you might need to do or remember for an event (not necessarily your event). A whiteboard or butcher's paper is good for this.

Keep writing until you have exhausted your ideas and then look at the list you have created and see if you can refine it a little. Are there several entries on your list for lighting that could all be grouped under a heading 'lighting'? Keep refining until you are happy with the first draft of your Event Checklist.

If your organisation has someone who can use a computer spreadsheet program (e.g. Microsoft Excel or similar), put the list in to this program as the beginning of a spreadsheet. The spreadsheet can be used to sort the list in different ways. There are no formulae or calculations involved. If you don't have a spreadsheet, you could use the table function in your word processor program (eg Word).

If you are not comfortable using computers, use butcher's paper or white boards to work on your lists with your organisation. White boards are useful because you can easily update the information on them. If you do work in this way, you will need to keep rewriting your lists as information changes.

The only rule is: Never delete from your first list – always add to it.

When you have your first event checklist, you add a column to the right called 'OK' (see next page). You now have a quick and visual way of checking what elements need to be thought of for your event. Here is an example of an event checklist.

Event Checklist

Topic 2: Event Planning Tools

Use the OK column to check things off as they are done.

<i>Item</i>	<i>OK</i>
SAFETY	
St John's	
first aid kit	
staff	
ambulance	
Fire	
appliances	
fire extinguishers	
crew	
Lost children	
Incident and accident report	
Emergency plan	
Security	
Who has final say to go or stop?	
HEATING/COOLING	
CATERING	
Food Stalls	
Alcohol	
Soft drinks	

Activity

Brainstorm your first Event Checklist.

What things do you need to think about for any event? For your event? Make a simple list and then refine it into categories (e.g. list all of the elements that require power under "Power"). Don't be afraid to refine the list again and again until it is in its most workable form for you.

Event Checklist

<i>Item</i>	<i>OK</i>

Exercise 3

(turn to page 47)

Items

In the assessment template on page 46, write at least five items you have brainstormed into the Items column of the checklist for your event.

Topic 2: Event Planning Tools

The Timeline

Now the real power of the Checklist can start to be seen. Add another column (see the examples below) and put dates in when things are due or likely (or planned!) to happen (the 'Date' column). Sort your Checklist by the Date column and you now have an event timeline. Obviously the more information you key in the more detailed the timeline.

<i>Date</i>	<i>Item</i>	<i>OK</i>
	SAFETY	
	St John's	
12 Feb 04	first aid kit - buy	
12 Feb 04	book staff	
13 Feb 04	book ambulance	
	Fire	
13 Feb 04	book appliances on site	
15 Feb 04	hire fire extinguishers	
15 Feb 04	book crew	
8 Mar 04	Lost children – finalise plan	
10 Mar 04	Incident and accident report – produce	
10 Mar 04	Emergency plan – finalise	
12 Mar 04	Who has final say to go or stop? – advise all	

Exercise 4

(turn to page 47)

Timeline

In the Date column of the assessment template, put working dates for the five items on your checklist.



Topic 2: Event Planning Tools

The Action List

Adding yet another column for names of those responsible for making that event action happen (the 'Who' column) gives you an Action List. You can sort by Who and see straight away who is responsible for what area. This means that all the members of your event team have their own personal Action List. Remember to always include the OK column. When something is completed and there is no further action required, simply shade the OK box next to that item and when you are working through the document you can easily see which items are completed.

<i>Date</i>	<i>Item</i>	<i>Who</i>	<i>OK</i>
	SAFETY		
	St John's		
12 Feb 04	first aid kit - buy	TM	
12 Feb 04	book staff	SB	
13 Feb 04	book ambulance	SB	
	Fire		
13 Feb 04	book appliances on site	SB	
15 Feb 04	hire fire extinguishers	TM	
15 Feb 04	book crew	TM	
8 Mar 04	Lost children – finalise plan	TM / SB	
10 Mar 04	Incident and accident report – produce	TM / LF	
10 Mar 04	Emergency plan – finalise	TM / LF	
12 Mar 04	Who has final say to go or stop? – advise all	SB	

Adapted from *Festival and Event Management Data CD Vol.1 – Basic Systems*, Visible Management, 2002 © Brown, S.

Exercise 5

(turn to page 47)

Action list

In the **Who** column of the assessment template, write the names of the people who will be responsible for the items on your checklist.



This method works really well. The key is to never delete anything from the list - always add. Each time you think of something new for an event add it to your master copy of the Checklist. Then when you are about to commence work on an event, 'Save As' the Checklist so that you are in no danger of losing any information by over-writing it or due to computer crashes, etc... Of course your Event Checklist will get bigger over time but it is a really powerful tool to manage the information of your current or any future events.

More uses for checklists

Now you have your basic information in checklists.

If you are using a spreadsheet program, you can create almost all of the planning documents you need for any event by adding columns and sorting them in different ways. To do this, select Data then **Sort** on the menus. Scroll the arrow down until you reach the column you want to sort by (eg Date, Who).

Print out the lists you get from each sort. Put them into a folder (a ring binder is secure and easy to use) and you have an Operations Manual ('Ops. Manual') for your event.

Learning to sort and adding columns in a spreadsheet program is straightforward. Producing these lists does not require any understanding of advanced spreadsheet operations or calculations.

Staffing

Action List sorted by Who then Date

This sort creates a staffing schedule. You can use this to provide personalised Action Lists to your event team members. You can also quickly monitor the workload for each of your team and make sure that no one has more work than they can handle. You can resolve overload situations by looking at the dates the work is required or the staff resources allocated to that work. The spreadsheet will highlight the problem for you and avoid nasty surprises when work can't be achieved in a given timeframe or – worse – your event team (whether paid staff or volunteers) get stressed and burnt out or disgruntled and leave.

If the Who column is the names of your suppliers you have a quick schedule for each of your suppliers.

Resource Schedule

Action List with Time column added and sorted by Date, then Time, then Who

Add a column and key in the heading Time.

Format that column as 'time' (Format Cells Time in MS Excel).

Use 24 hour or military time, where 1am is 0100, midday 1200 and midnight 2400 hours. Your spreadsheet can now sort by hours and minutes.

This will give you a timeline for when activity or deliveries or performances, etc happen. It will quickly show up any problems (e.g. truck arrives with stage after the concert has finished) because you will see what is occurring in consecutive date and time order.

Topic 2: Event Planning Tools

<i>Date</i>	<i>Time</i>	<i>Item</i>	<i>Who</i>	<i>OK</i>
12 Feb 04	0800	Security on gates	LL	
12 Feb 04	0900	Sound crew commence	DA	
12 Feb 04	0915	Sound truck arrives	DA	
12 Feb 04	0930	Commence sound installation	DA	
12 Feb 04	1230	Sound installation complete	DA	
12 Feb 04	1230	Line check commences (20 mins.)	DA	
12 Feb 04	1245	Band 3 called to stage	TM	
12 Feb 04	1250	Sound check commences (20 mins.)	TM / DA	
12 Feb 04	1310	Changeover, set up sound check Band 2	DA	
12 Feb 04	1315	Band 2 called to stage	TM	
12 Feb 04	1320	Sound check commences (20 mins.)	TM / DA	
12 Feb 04	1340	Changeover, set up sound check Band 1	DA	
12 Feb 04	1345	Band 1 called to stage	TM	
12 Feb 04	1350	Sound check commences (20 mins.)	TM / DA	
12 Feb 04	1410	Set stage for opening	DA	
12 Feb 04	1530	BAND 1 commence	TM	

Adapted from *Festival and Event Management Data CD Vol.1 – Basic Systems*, Visible Management, 2002 © Brown, S.

Production Schedule

Same as Resource Schedule

This is the same spreadsheet as the one above but is usually used for the pre-production and post-production period (usually weeks and days rather than months) of the event only.

Running Order / Program

Same as Resource Schedule

The same spreadsheet but used usually for the day of the event only with more time specific details. Your Time column can now be re-formatted to have 24 time with seconds, to allow more precise cueing of activity at your event. If you are using any audio visual elements in your event you can even sort by hours, minutes, seconds and frames which can be useful for cueing exact moments in a video, for example. Remember to sort by date first, otherwise you will have a schedule of everything that happens at 9.00am (0900) even if they are months apart!

Marketing Plan

Sorted by Who then Date then Time

If you assign all marketing and publicity action to, say, PR in the Who column, when you sort by Who then Date then Time all the items that have PR will bunch together in date and time order. Instant Marketing Plan! Set the print area for just the section that has PR and you can print out a detailed plan. It certainly doesn't show the rationale behind the activity as a true marketing plan would, but does give you a detailed account of your schedule (including print and any advertising, poster distribution and other marketing activities).

Topic 2: Event Planning Tools

You can use Set Print Area (as it is called in Excel) to print excerpts from any part of your spreadsheet so you can have a 'separate' marketing schedule, staff roster, running order and so on, but all the information is contained in the one spreadsheet so there are not multiple versions floating around your event team that are out of date or inaccurate.

Budget

Add Budget, revised and Actual columns to the Event Checklist

A quick way of developing a budget for your event (from which your finance person or accountant can get information, more of that later) is to use all the detail you already have in your Event Checklist and add some money columns and suddenly you have a very detailed budget.

Using the checklists again – your blueprint

These checklists provide the 'blueprint' or 'pattern' for your event.

If you are doing the event again then using these same checklists is extremely powerful. You will have all the information you need - dates, times, costs, suppliers and so on - right from Day 1 of the new event.

If you are doing another kind of event you still have a very detailed document which has information that can be culled and used to help set up the new event.

Always keep these 'blueprints' from any event you work on. They will save you hours of time and provide you with a valuable resource for any event or scheduled activity that you are involved with.

Something to think about...

If you have good computer skills, you may want to have a look at the various project management systems available. (e.g. Microsoft Project). They are quite complex to learn initially and can be time consuming at first but they are very useful for very complex events. They are expensive to buy so trial one first. A friend or colleague who works in the construction industry or at the local council is likely to have a copy for you to look at.

Topic 3: Event Budgeting

In this topic, we will look at the differences between using a budget for accounting and for planning. This topic covers the rules of budgeting for events, how to analyse box office at your event, and how to manage an event in the face of a shortfall in income.

Accounting versus Planning

Strong financial management is important for the success and management of any event, but an Event Budget - as distinct from the kinds of financial documents an accountant might develop and use – are as critical to the success of an event's planning and programming.

In many smaller events you will need to work with both styles of financial documents. In larger events there might be someone on the organising committee who acts as treasurer. In organisations with paid staff, there may be an accountant and/or a finance department who will look to the event manager to provide regular information while they manage the daily finances, bill paying, and so on.

Simple Event Budgets are cash only and not based on an accrual system (a more formal accounting system) and can be developed from your Event Checklist.

The main uses of an Event Budget are:

- Planning and predicting (forecasting) likely expenditure on the current event
- Using money within a budget to maximise the impact of the program of the event
- Managing any shortfalls in income or over-runs in expenditure
- Planning for future events

Here's an example of a simple event budget.

<i>Item</i>	<i>Budget</i>	<i>Revised</i>	<i>Actual</i>	<i>OK</i>
Expenditure				
Performers				
Stage				
Security				
Toilets				
TV Advertising				
Poster & Distribution				
Total Exp.				
Income				
Ticket Sales				
Sponsorship				
Donations				
Grants				
Misc. (interest, etc...)				
Total Inc.				
TOTAL				

Topic 3: Event Budgeting

This is a simplified example and your event budget will be much more detailed!

To explain the columns:

- Budget – your best guesstimate of what the expenditure will be. This might be based on previous events you have managed or from initial quotes from suppliers.
- Revised – this column is where the real event planning work is done! As the details of your event become more certain and costs are finalised the revised figure goes into this column.
- Actual – this column is filled in after the event with the actual amounts paid for each expenditure line.

The same applies for the Income figures.

Note:

- There is no 'Variance' or 'Year To Date' columns. These will be required for the accounting side of the finances. **This budget is a planning tool.**
- Use whole dollars in the first two columns but dollars and cents for the Actual column.

Budget Rules

Before we go too much further with the budget we need to look at some rules:

Expenditure first, Income second – previously we talked about keeping your vision wide. Unfortunately we now must rein ourselves in a little. Doing the expenditure for your event is often sobering. Doing the Income first often leads to highly optimistic expenditure planning based on what money is available. The former is a more conservative approach and when it comes to money we need to be more conservative than risky.

Pessimistic not Optimistic – again, go for the pessimistic level of expenditure AND a pessimistic level of income planned for. You can always spend more money if it comes in or you make savings – that's the fun part! Trying to make an event happen when you have over-estimated the income or under-estimated the expenditure is soul-destroying!

Build budget 'fat' – you will probably have heard of budgets that have 'a little fat' in them. It refers to the rule above about UNDER-estimating Income and OVER-estimating Expenditure (don't get these the wrong way around!). Simply, if a quote from a supplier comes in at, say, \$345.78 put it in the budget as \$400.00. So now there is \$54.22 'fat' in your budget. Rounding things out to the nearest ten dollars or even hundred dollars is sensible depending on the scale of your budget.

The Bottom Line – this is the total expenditure for the event. Once you have arrived at that figure, don't change it! Use the revised column to manage any changes in income and expenditure (either positive or negative) and leave the bottom line as is.

Contingencies – this is an amount of money (usually a percentage of the total expenditure) that is set aside for emergencies only. We'll discuss how a contingency might be used later. For now we need to know that the TOTAL expenditure for the event is the total of the expenditure AND the contingency combined. Not that many years ago a 10% contingency was very common. Now it seems that 5% is good to aim for and even 2.5%. For events – which are complex creatures – a 5% contingency is worth having.

Topic 3: Event Budgeting

Here's our budget again with some additions based on the above.

<i>Item</i>	<i>Budget</i>	<i>Revised</i>	<i>Actual</i>	<i>OK</i>
Expenditure				
Performers	1500			
Stage	750			
Security	1200			
Toilets	1100			
TV Advertising	2000			
Poster & Distribution	850			
Expenditure	7400			
Contingency (5%)	370			
Total Expenditure	7770			
Income				
Ticket Sales	5000			
Sponsorship	2000			
Donations	150			
Grants	600			
Misc. (interest, etc...)	110			
Total Income	7860			
TOTAL (surplus)	90			

Note:

- All the figures in the Budget column are whole dollars and are rounded out to the nearest \$10
- The Expenditure is \$7400 and 5% of that is \$370 and that becomes the Contingency and thus the REAL total expenditure is 7400 + 370 = 7770
- The budget shows a **SURPLUS** of \$90

Box Office / Ticket Sales Analysis

Before we look at exactly how to use the budget as a planning tool we need to look at one of the main sources of income for events – charging people to attend. If the event is an indoor, performance based event it is called Box Office. If it is any other kind of event where an admission fee is charged it is called Ticket Sales.

Case Study

Ashworth Fair charged an entry fee to attend the daytime events on the oval – this generated income from Ticket Sales.

Seats sold for *Muriel's Wedding* in the Performing Arts Centre generated income through Box Office.

Best Estimates

Guesstimating ticket sales is an art in itself and many events have struggled if this is not managed well. Many an entrepreneur has gone bust by not correctly estimating the likely attendance (often compounded by breaking all of the Budget Rules!) and not reading the Target Market accurately.

Topic 3: Event Budgeting

Clues from the Marketplace

If you are managing a new event then it really is a guesstimate, but it can be based on intelligence about the market, such as:

- What are similar events – those aimed at your target market, those occurring at a similar time and in similar venues - attracting?
- What ticket price are they charging?
- What ticket price categories are they using?
- How does their act or show compare to yours in terms of likely drawing power?

Obviously if you have done the event before then you can use last time's figures but you should undertake the above Market Research regardless.

The Formula

To determine the likely box office you need to apply the following formula:

Number of performances x Capacity x Average Ticket Price x 100% = Total Box Office

An easy way to analyse the box office is to set up that formula in a spreadsheet. Then you can change any of the parameters and see what impact that has on the Total Box Office. Remember the formula above gives you the total box office if every ticket sells. This is the starting point but not what you put in your budget!

Here's the formula as a spreadsheet.

<i>No. of Perfs.</i>	<i>Capacity</i>	<i>Ave. Tix Price</i>	<i>%</i>	<i>TBO (Total Box Office)</i>

If a one day event has a capacity of 1,000 and the average ticket price is \$8.00, then if every ticket was sold we would generate a total of \$8,000 in box office. Note that this does not match our expected income of \$5,000 in our budget. We'll see why soon.

<i>No. of Perfs.</i>	<i>Capacity</i>	<i>Ave. Tix Price</i>	<i>%</i>	<i>TBO</i>
1	1000	8.00	100	8,000.00

Some notes on the formula:

- For most theatre or concert events promoters usually set their expected income somewhere between 60% and 70%
- Capacity excludes any tickets that are not charged for (eg complimentary tickets for sponsors or guests, etc).

Topic 3: Event Budgeting

Breakeven Point

What we need to determine is the Breakeven Point – the point at which we make enough money from sales to cover the estimated expenditure in our budget. If we sell more tickets we have more money to play with but what we must know is the minimum number of tickets we need to sell to break even.

Using our spreadsheet we keep changing the percentages until we find a % that gives us a \$5,000 Total Box Office.

<i>No. of Perfs.</i>	<i>Capacity</i>	<i>Ave. Tix Price</i>	<i>%</i>	<i>TBO</i>
1	1000	8.00	100	8,000.00
1	1000	8.00	70	5,600.00
1	1000	8.00	60	4,800.00
1	1000	8.00	63	5,040.00

As you can see after playing with the percentages we breakeven at 63%. We could also change some of the other parameters (more performances, bigger capacity, more days of the event, etc...) but we need to decide if the market can bear that and to remember that if you increase the number of days of an event you also increase the expenditure.

Now that we know 63% is the Breakeven Point, we can also work back and determine that the total number of tickets we need to sell is 630 (63% of the 1,000 capacity). Seems not unreasonable but remember, if our show is a new group performing outside school holidays in an obscure venue, 10 tickets might be hard to sell. If, however, we have a well known group (say The Wiggles), during school holidays, a Wiggles Movie has just been released and the Wiggles CD has just gone Platinum then maybe 63% is a little low!

Average Ticket Price

Another simple spreadsheet calculation is called for. You need to know what the average ticket price is to do the analysis and you need to again make guesstimates based on market intelligence.

<i>Type</i>	<i>Net Price</i>	<i>GST</i>	<i>Fee</i>	<i>Selling At</i>	<i>% of Capacity</i>	<i>No of seats</i>	<i>Total Income</i>
Adults	7.00	0.70	2.00	9.70	35	350	3395.00
Children	5.00	0.50	2.00	7.50	45	450	3375.00
S, P, U	7.00	0.70	2.00	9.70	12	120	1164.00
Groups	6.00	0.60	2.00	8.60	8	80	688
						1000	8622.00

Note:

- SPU is Students, Pensioners and Unemployed (in this case there is no concession for them)
- Groups are discounted tickets sold to groups of 10 or more
- The Fee is the ticket outlet's charge for selling your ticket

The final calculation to determine the average ticket price is to divide the total income by the capacity, e.g. \$8622 / 1000 = \$8.62

Topic 3: Event Budgeting

The following activity is to be carried out within your organisation. If you don't have experience in working out these sorts of calculations, ask for help from someone in the community who does have them.

Accountants, bank officers and efficient business managers should be able to help.

Activity

Box Office Analysis

Identify the range of ticket prices and the average ticket price for your event.

What is the breakeven point based on a \$100,000 expenditure?

Topic 3: Event Budgeting

Planning through the budget

Now that we have assessed all the elements of the budget it is time to get underway booking items from suppliers, contracting artists and so on. Usually, as the detail of the event is firmed up there are many changes to the Budget column costs which were estimated or quoted initially.

These changes need to be managed so that the bottom line isn't exceeded and the event loses money. On the positive side, if there is any 'spare' money (this happens less often) we can manage it to further develop the budget.

Here's where event budgeting departs most from true accounting practice. Most accountants would say that any excess funds in any budget line must be returned to the general coffers of the organisation. As event managers we don't want to give it back, we want to use it on our event!

You must make sure that you have the authority to do this, however, from your organising committee, board or employer. Once you have the approval then any savings you make could be used to make the event better! Remember, it works both ways so any over-runs in expenditure or shortfalls in income also have to be absorbed by the budget.

Let's look at two scenarios. First, we have made some savings on expenditure and the income has come in a little higher than expected.

<i>Item</i>	<i>Budget</i>	<i>Revised</i>	<i>Actual</i>	<i>OK</i>
Expenditure				
Performers	1500	1500		
Stage	750	820		
Security	1200	990		
Toilets	1100	900		
TV Advertising	2000	2000		
Poster & Distribution	850	850		
Expenditure	7400	7060		
Contingency (5%)	370	353		
Total Expenditure	7770	7413		
Income				
Ticket Sales	5000	5000		
Sponsorship	2000	2000		
Donations	150	230		
Grants	600	600		
Misc. (interest, etc...)	110	105		
Total Income	7860	7935		

Now we have a budget surplus of \$522 and we need to know how we can apply those funds back into the event. Buying a new 4WD is NOT an option – the money must go back into making the event work better for your audience.

Topic 3: Event Budgeting

The priorities for reallocating savings are (in order):

1. **Program** – because this is what the audience comes to see
2. **Marketing** – because this tells the audience about the event
3. **Logistics** – lowest priority because before you would proceed with any event you would have the essential logistics in place

This way you are using the surplus to make the event better; you are polishing it, refining it.

Adding the surplus back in according to those priorities we might see:

<i>Item</i>	<i>Budget</i>	<i>Revised</i>	<i>Actual</i>	<i>OK</i>
Expenditure				
Performers	1500	1700		
Stage	750	820		
Security	1200	990		
Toilets	1100	900		
TV Advertising	2000	2200		
Poster & Distribution	850	925		
Expenditure	7400	7535		
Contingency (5%)	370	377		
Total Expenditure	7770	7912		
Income				
Ticket Sales	5000	5000		
Sponsorship	2000	2000		
Donations	150	230		
Grants	600	600		
Misc. (interest, etc...)	110	105		
Total Income	7860	7935		
TOTAL	90	23		

So... we have put more money into artists, TV advertising and the poster and we still have a small surplus. Note that the contingency line always needs to be a part of the calculation.

But what if the expenditure goes up and the income goes down as we get closer to the event?

The process is similar but the priorities are reversed. If the bottom line exceeds the budgeted income then you must make one of three decisions:

- **Find more money** - anyone who has worked on events knows that the last one is the very hardest to achieve, particularly close to an event. Definitely try for this but not at the risk of ignoring the following.
- **Cancel the event** - this is extreme but you must have the courage to do this if the event can't pay for itself. It is illegal to proceed with an event if you do not have the funds to pay the bills. You can't manage events from inside a cell.
- **Cut elements of the program** – this is the first place to start!

Topic 3: Event Budgeting

Priorities for cutting elements of events

If you are forced to cut elements of the event, then do so in the following order:

- 1. Logistics (eg lighting, staging, decorations)**
- 2. Marketing**
- 3. Program**

Try and quarantine the program from any cuts.

Another tool to help make these difficult decisions is to give each event element its own A, B, or C classification. This makes it easier to see priorities clearly.

- A – Essential to the event.** If you don't have this element, then the event can't go ahead
- B –** If you have to **cut** this element it **will damage the event** but not enough to breach the contract with your audience and the event can go ahead
- C – Nice** to have in your event **but if it goes you aren't too fussed.**

If you have these classifications then you obviously cut the C's first, the B's second and if you have to cut any A's you must reconsider whether you can hold the event at all. (For instance, if you were planning a Kiri Te Kanawa concert and you had to cut Te Kanawa you would have to cancel.)

You can also use these classifications within the broader Program, Marketing and Logistics categories when you are adding money to an event as in the more positive scenario. The A's get the money first, B's second, C's last.

At the end of all your cutting, if you have an expenditure that equals the total income and you haven't cut any A's you are in OK shape to run the event. It's not as good as it might have been but at least it is going ahead. If you can't avoid cutting A's and/or you can't get the expenditure and income to balance – then you must cancel the event.

Contingencies

A word on contingencies. These amounts must not be used until the very last moment. They are not used to massage the budget, that's the Revised column's role. Contingencies are left untouched until the day of the event. Even if you are faced with the bad scenario above you should leave the contingency alone because if you do proceed with cuts you need a contingency up your sleeve for things that go wrong on the day – as they often do regardless of how well you have planned.

Exercise 6

Budget Strategies

(turn to page 47)

Write two strategies for dealing with a shortfall in income of \$2,000 for your event.



Case Study

The Ashworth fair committee decided to raise the proposed ticket price for *Muriel's Wedding* by \$3 per adult ticket. Children and concession tickets were raised by \$1.50. Working on a 70% capacity house (selling 525 tickets out of 750) and 50% of ticket sales being to adults paying full price, they estimated their increased income as

$$263 \text{ adult tickets} \times \$3 = 789$$

$$263 \text{ concession tickets} \times \$1.50 = \$394.50$$

$$\text{Total from increased ticket prices} \quad \$1183.50$$

They decided that the extras for the party scenes would wear less elaborate costumes.

This would save \$850.

Total increase in income of \$2033.50, using one strategy of increasing admission and a second of cutting infrastructure costs.

Topic 3: Event Budgeting

Event Expenditure Budget Template.

The following budget template gives a more detailed breakdown of the sorts of expenditure you would need to consider in an event budget.. It is based on an actual event, an indoor corporate cocktail party.

Acc code	Detail	Budget	Revised	Actual	Notes
	EXPENDITURE				
0100	Venue				
0101	Rental				
0102	Decoration				
0103	Table Decorations				
0104	Cutlery & Glassware				
0105	Staff & Costuming				
0106	Tablecloths				
0107					
		0	0	0.00	
0200	Design & Artwork				
0201	Design				
0202	Menu Printing				
0203	Invite Printing				
0204					
		0	0	0.00	
0300	Artists/ Performers				
0301	Table Performers				
0302	Saxophonist				
0303	Dance Band				
0304	Movie Hires				
0305	Scenes (in running order)				
	<i>1. Chicago Bar</i>				
	<i>2. Dressing Room</i>				
	<i>3. Midsummer Night's Dream</i>				
	<i>4. Blithe Spirit</i>				
	<i>5. West Side Story</i>				
	<i>6. The Club</i>				
	<i>7. Waiting For Godot</i>				
	<i>8. Act Without Words II</i>				
0306					
		0	0	0.00	
0400	Technical				
0401	Sound Hires				

Topic 3: Event Budgeting

<i>Acc code</i>	<i>Detail</i>	<i>Budget</i>	<i>Revised</i>	<i>Actual</i>	<i>Notes</i>
0402	Lighting				
	Technical Director				
	Technical Assistant				
0402	Staging				
0404	Sets / props				
0405	AV				
0406					
		0	0	0.00	
0500	Catering				
0501	Food & Drink				
0502	Tables				
0503	Chairs				
0504					
		0	0	0.00	
0600	Photography/ Signage				
0601	Stills				
0602	Signage				
0603					
		0	0	0.00	
0700	Guests				
0701	corporate gift				
0702	meet & greet setup				
0703					
		0	0	0.00	
0800	Event Management				
0801	Visible Management				
0802	Stage Manager				
0803	Crew				
0804	Super / Workcover				
0805					
		0	0	0.00	
	Expenditure sub-total	0	0	0.00	
	contingency	0			
	TOTAL EXPENDITURE	0	0	0.00	

Brown, S., *Festival and Event Management Data CD Vol.1 – Basic Systems*, Visible Management, Adelaide, 2002

Topic 4: Event Management

In this topic, we look at event management needs before, during, and immediately after an event. We look at the role of the management team, the event crew and other volunteers.

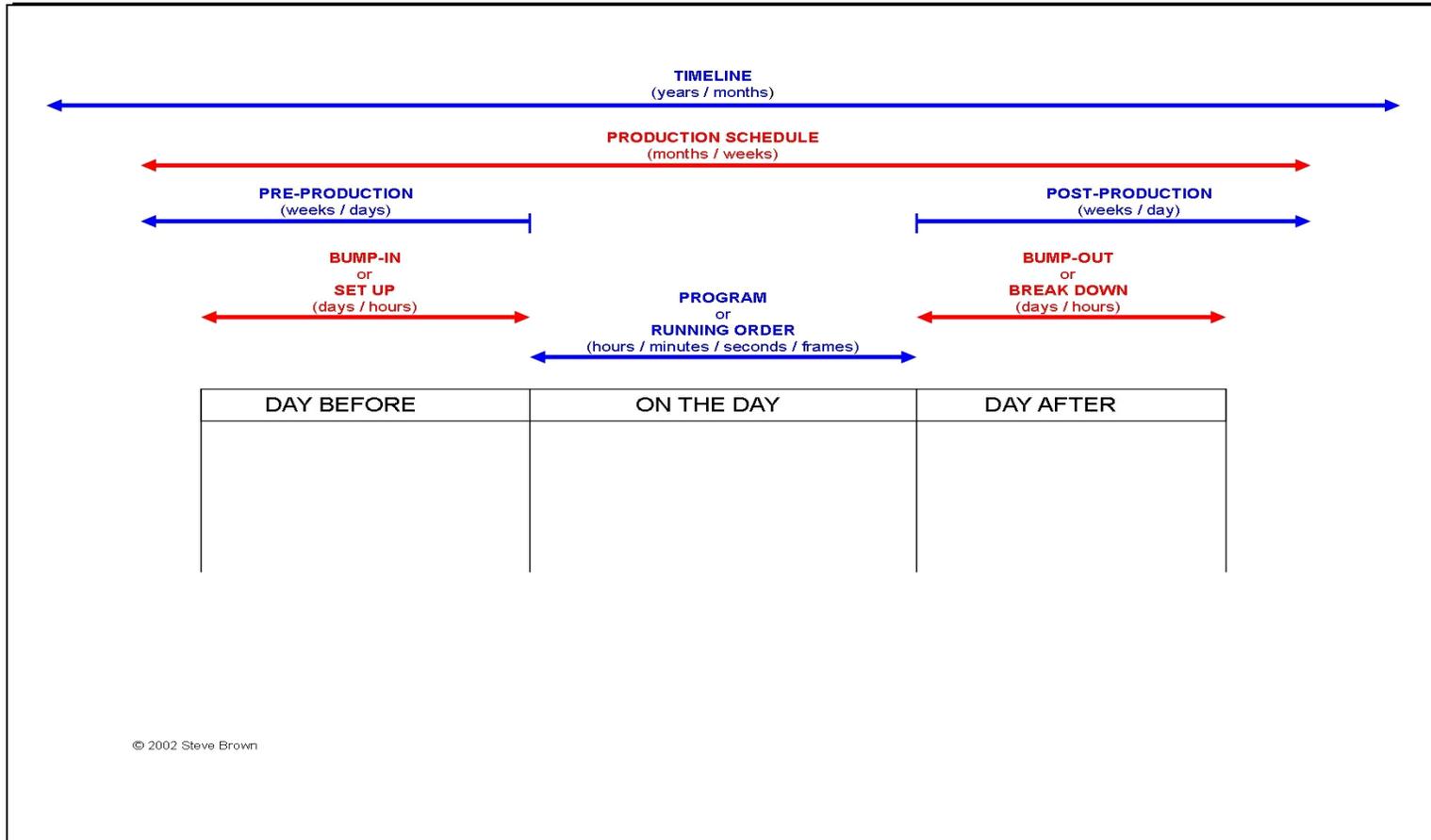
Event Scheduling

Event Management can be defined as the management of an event through the development and control of scheduled activity. Events - whether indoor or outdoor, big or small, community cultural festival or marketing mechanism for a global corporation – all rely on effectively managed schedules for their success.

Some event management terms you are likely to encounter are:

- **Timeline** – the entire period of the management of the event, from its initial conception to the debrief and post-event report and leading to the pre-event work on the next-event. Major landmarks in the planning rather than finite detail. (years/months)
- **Production Schedule** – the period closer to either side of an event, more detailed and usually includes more technical information (months/ weeks)
- **Pre-production** – the day(s) immediately before the event that can include the bump-in (or set up) (weeks/days)
- **Post-production** - the day(s) immediately after the event that can include the bump-out (or break down) (weeks/days)
- **Bump In** – the days of the set up of the event (days/hours)
- **Bump-Out** - the days of the break down or get out of the event (days/ hours)
- **Program** – the day of the event. Very detailed with all elements scheduled for the day including the entertainment or activity program (hours/minutes/seconds/frames)
- **Running Order** – same as Program but usually refers more specifically to the entertainment or activity program. (hours/minutes/seconds/ frames)

The chart on the next page shows how these phases of the timeline relate to each other.



Pre Event

The closer you are to the event, the more crucial it is to have clearly allocated responsibilities and shared understanding of what needs to be done. Using a one-day event with a one-day bump-in and one-day bump-out as an example, we can look at what the Event Manager does the day before, the day of, and the day after the event.

Before we do so we need to look at some other members of the event team:

Suppliers

Suppliers are those people or companies who provide any kind of service to an event for a fee or wage. They can include security personnel, the sound company providing the PA, caterers and so on. They have assigned tasks and responsibilities.

Volunteers

Volunteers are those who work on an event for no remuneration. Most community and cultural events are run entirely or mostly by volunteers. The management committee or board are likely to be volunteers, as well as the teams of workers who manage all the components of the event. They need clearly assigned tasks and responsibilities. Some ideas on how to maintain a loyal volunteer team are included at the end of this topic.

Committee members

Committee members will vary in their skills and experience. Again, try to match them to jobs that suit them. People with good communications skills can be allocated to look after sponsors and do media interviews. Those with electrical and mechanical knowledge are invaluable on the production side.

Event Crew

The event crew are key people working on the event. They work at the direction of, and report directly to, the event manager or convenor. For large events they may be paid. For most community events, you are relying again on volunteers.

You need a strong committee and a committed band of helpers for your crew on the day. If all your crew are volunteers, you will need to have involved them in discussion from early on in the planning process. It is important to take time early in the planning process to match the skills and interests of your volunteer team members to jobs that need doing. This helps to build a strong and capable team, with committed and experienced members. It's important to make sure that everyone knows their role and responsibilities on the day. Everybody in charge of an activity or area should have their own checklists and rosters for the day.

The event coordinator and paid crew are responsible for dealing with any problems or unscheduled issues that arise. Regardless of the size of your event or budget, an allocation for an event crew is always money well spent. They are your right (and left) hands. And make sure you remember to schedule breaks and food for them!

The day before an event

The event manager/convenor and key committee members should (in order):

Inspect the venue – checking for any changes from when you booked it, any safety issues, making sure that any deliveries that were scheduled to be there are, in fact, there. Doing a site inspection for any damage prior to your occupying can save you arguments with a venue owner later. Try and do this at least half an hour before anyone else is on site so that there are no distractions.

Brief the Event Crew –

Run through a final check with your team leaders and workers to make sure everyone is clear about their responsibilities and the schedule for the day. If you have paid crew, the event manager will give them an overview of what is occurring during the day, issue any communications, maps, schedules, etc and assign them their tasks for the day. The crew work independently and report back their progress regularly so that they can be re-assigned on completion of a task or be available to deal with a problem that arises. (assigned 60% / free 40%).

Make sure you have clear lines of communication with your team, and that everybody knows them.

Proportional Tasking – Event Crew are given some tasks during the day(s) before, during and after the event, but the proportion of their time that is assigned versus unallocated, changes. See the proportions in brackets.

Run to Schedule – this is a term for checking what actually happens against what you have planned the event.

Unless your event is different from every other event that has ever been held, not everything will go according to plan!

Note those things that are ahead of schedule, those that are behind, and any problems that arise. Put the notes you make on your printed schedules and, after the event, create **a post-event schedule** that shows

- what was planned,
- what actually happened and
- when

It is a powerful planning tool for next time.

De Brief – at the end of the day, have a quick debrief of your team leaders, key committee members and event crew. They will have been reporting throughout the day but get them together and get feedback on the state of play with the event. Identify what is ahead of and what is behind schedule, and note the reasons why.

Plan for tomorrow – take yourself away somewhere quiet where you won't be disturbed and re-work the schedule for tomorrow based on the state of play at the end of today. Develop strategies for dealing with any problems so that solutions are ready to be put in place first thing tomorrow.

Topic 4: Event Management

On The Day

On the day of the event the event manager/convenor should (in order):

Inspect the venue – checking for any changes from yesterday, identify any public safety issues, make sure what you are expecting to be in place is in place.

Brief the team and the event crew – give them an overview of what is happening during the day, issue any communications, maps, schedules, etc. and assign them their tasks for the day. Before the audience is on site - assigned time should be 30% and unallocated time 70%. Once the audience is on site – assigned time is 5% and unallocated time 95%. This factors in time to manage the unexpected.

Run to Schedule – continue to note things that are ahead of schedule, those that are behind, and any problems that arise. Schedule some 'down time' just before the audience is on site so the team can collect itself and take a breather.

Brief for the bump-out – on many events you can begin bumping out elements of the event (that are out of sight and ear of the audience and not required for when the audience leaves) once the event is underway. Brief the team and the event crew and get the bump-out underway.

Thanks – immediately at the conclusion of the event say 'thank you' to the team. Keep working on the bump-out and getting the audience out.

De Brief with authorities – if it is a large event, discuss any incidents with police, first aid, etc. so that you are made aware of what happened at your event so you don't get told about it by a journalist! If it's a smaller event the same applies. It always pays to touch base with the client or the employer.

Debrief - at the end of the day, have a quick debrief of the event crew and get **feedback** on the state of play with the event. Identify what is ahead of and what is behind in the bump-out schedule.

Plan for tomorrow – re-work the schedule for tomorrow based on the state of play at the end of today.

Our schedule would look something like this for an 8.00pm (2000 hours) start:

<i>TIME</i>	<i>DAY BEFORE</i>	<i>DAY OF</i>
0730	Check the venue	Check the venue
0830	Brief the event crew	Brief the event crew
0900	Run to schedule	Run to schedule
1300		Down time (15-20 minutes)
1400		Doors open, audience in
1645	Debrief the crew	
1700	Close	
1800	Plan for tomorrow	
2000		Concert commences
2030		Brief for bump-out
2100		Commence bump-out
2230		Concert ends
2235		Thanks / Debrief with client and authorities
2300		Debrief the crew
2315		Close
2330		Plan for tomorrow

What should the Event Manager or convenor be doing whilst the event runs to schedule?

NOTHING

We will discuss why soon!

Activity

In groups, discuss the experiences of participants at events and the roles undertaken in their management of events.

Post Event

The day after the event the event manager/convenor should (in order):

Inspect the venue – checking for any changes from yesterday, identify any damage, making sure that the venue is in as good or better condition than you found it.

Brief the team/event crew– give them an overview of what is occurring during the day, issue any communications, maps, schedules, etc. and assign them their tasks for the day. (assigned 90% / unallocated 10%).

Run to Schedule – continue to note those things that are ahead of schedule, those that are behind, and any problems that arise.

Thanks – immediately at the conclusion of the bump-out say ‘thank you’ to the team/event crew.

Party! – have a lunch or dinner together as a thank you. This is where many of the event legends will be born and where your team will get their nicknames and where you will get valuable information about what happened at the event that they solved without referral to you! This can be an informal debrief for you so take note (mentally) of what is revealed.

Later

A formal debrief should be held later, when all the information is in and your team has recovered. It needs to be within a few weeks, so that details are remembered.

And a formal thankyou function should also be held after the event, to make sure that everyone is included and acknowledged.

Thank you letters should be sent to all volunteers, stakeholders and other key team members.

Topic 4: Event Management

Our schedule now looks something like this for a 12 noon (1200) finish:

TIME	DAY BEFORE	DAY OF	DAY AFTER
0730	Check the venue	Check the venue	Check the venue
0830	Brief the event crew	Brief the event crew	Brief the event crew
0900	Run to schedule	Run to schedule	Run to schedule
1300		Down time (15-20 minutes)	Party!
1400		Doors open, audience in	
1645	Debrief the crew		
1700	Close		
1800	Plan for tomorrow		
2000		Concert commences	
2030		Brief for bump-out	
2100		Commence bump-out	
2230		Concert ends	
2235		Thanks / Debrief with client and authorities	
2300		Debrief the crew	
2315		Close	
2330		Plan for tomorrow	

Exercise 7

Event Planning model

(turn to page 48)

Based on the scheduling model above, develop timetabling for your event detailing times and durations for:

- The day before,
- The day of, and
- The day after the event



What problems could arise at the event and how would you deal with them?

The Role of the Event Convenor/Manager

The prime responsibility of the Event convenor or manager on the day of the event is to those involved - whether as audience members or as a members of the event team. The delivery of a positive and great event experience and the care and safety of the audience and team rests with the management team. This can only occur if the event and all activity run according to your event plan.

The Event convenor or manager has other, equally important responsibilities. You must be able to **respond quickly and efficiently** to any:

- changes
- incidents
- problems

and have the capacity to make correct decisions to resolve those issues in an appropriate and timely manner.

You must also be **free to make those creative decisions** that can turn an ordinary event into a spectacularly successful one should an idea or an opportunity arise to do so.

You must **observe the event and identify areas of improvement**, whether it is to further develop the existing event or to be implemented as part of the design of your next event.

This is your **'duty of care'** to the participants of this event and any future event.

To be able to do all of these things at an event you can not have any assigned tasks - that is the load your event team and the crew must take from you – and it is why a good team is so important to you and to your event.

It doesn't mean you are doing 'nothing' at all, far from it. You are there in the pivotal role for the entire event. You must be free of assigned tasks so that you are clear-headed and able to make quick decisions. You must be free to observe and pre-emptively deal with issues before they arise. If an emergency arises you need to be available, contactable – not away putting up a sponsor sign that's fallen down.

Make sure you have someone designated to talk to media and VIPs, and spend time with sponsors. This might be your committee chairperson or someone else good at dealing with people. It should not be the event manager.

Once you have decided on a course of action, it is the event team and crew who implement that action so that you remain free to deal with the next crisis. Keep doing 'nothing'!

Volunteers

Volunteers are the backbone of many events. They work because they want to, and will have many different reasons for involvement. They bring a wide range of skills and experience which need to be brought out so they can be encouraged to work in their interest areas and where they can help others. Like all other

Topic 4: Event Management

workers, volunteers appreciate recognition as part of a team and like to have their contribution acknowledged.

Some ideas for showing appreciation to volunteers that have been applied at events are set out below. These same ideas can be used to develop and keep a loyal and enthusiastic event crew.

- Titles – people like titles as they create a sense of (appropriate) importance.
- Uniforms – helps identify the volunteer as part of the team.
- Laminated passes – as above. Both uniforms (especially crew or event t-shirts that the general public can't buy) and passes become hot property collector items for crew and volunteers. 'Badges of honour'.
- Privileges – if there is close parking for VIP's then get close parking for the volunteers.
- Membership – people like to feel part of an exclusive 'club'.
- Success - a successful event or successful experience will bring volunteers back next time.
- Thank you/recognition – so simple but often overlooked. A letter, a gift, lunch/dinner/drinks, awards, rewards – all work well. Just saying "thank you" is essential.
- Clear hierarchy/Chain of command – knowing exactly where they fit in the scheme of things, who they report to and what is expected of them.
- Meaningful work – self explanatory. No one likes meaningless or demeaning work.
- Insurance cover/legal responsibilities – volunteers are entitled to the same cover and protection as an employee and have similar responsibilities to the event. Put in writing what you expect from them and what you will give in return. Volunteer organisations in each state will have a wide range of resources for you.
- Match people to positions – people like doing work that they know they can do well
- Equal importance – volunteers are equal members of the team, and should be treated as such
- Focussed briefing – when information is given to them, be brief, concise and don't keep them hanging around unnecessarily.
- Build the team – give them a crew name, reward with chocolate donuts, build true relationships, have fun – the more they feel a part of the team the more they will be part of the team.
- Honesty – always!

Some thing to think about...

Talk to your state volunteer organisation and obtain pro forma of volunteer agreements and codes of conduct and details of what your organisation's responsibilities are to them. Check the Volunteering Australia website at www.volunteeringaustralia.org

Event Planning Assessment Template

Our event name is:

Exercise 1 Core Values

Write one statement in answer to each of the four questions you need to address to establish your core values.

Why are you holding this event?

Who is your event for? (your target market)?

What will happen at your event?

What do you want to achieve?

Exercise 2 Program Elements

Our program elements will include:

Active program element 1

This relates to design principle _____ in these ways

Passive program element 1

Exercise 3 checklist – Items

Write at least five items you have brainstormed into the Items column of the checklist below.

Exercise 4 checklist – Timeline

In the Date column put working dates for the five items on your checklist.

Exercise 5 checklist – Action list

In the Who column, write the names of the people who will be responsible for the items on your checklist.

<i>Date</i>	<i>Item</i>	<i>Who</i>	<i>OK</i>

Adapted from **Festival and Event Management Data CD Vol.1 – Basic Systems**, Visible Management, 2002 © Brown, S.

Exercise 6 Budget Strategies

Give two strategies for dealing with a shortfall in income of \$2,000 for your event.

Exercise 7 Event Planning Model

Using the scheduling model on page 43 as a guide, develop a schedule for your event detailing times and durations for:

- The day before,
- The day of, and
- The day after the event

<i>TIME</i>	<i>Day before</i>	<i>Day of event</i>	<i>Day after event</i>
0630			
0730			
0830			
0900			
1300			
1400			
1645			
1700			
1800			
2000			
2030			
2100			
2230			
2235			
2300			
2315			
2330			

What problems could arise at the event and how would you deal with them?

Facilitators name and position _____

Facilitators signature _____ Date _____

Program Planning Template

This template can be used to devise an entertainment program for a one day event. Adapt the times to suit your own event.

time	active element 1	active element 2	passive
1000 1015 1030 1045			
1100 1115 1130 1145			
1200 1215 1230 1245			
1300 1315 1330 1345			
1400 1415 1430 1445			
1500 1515 1530 1545			
1600 1615 1630 1645			
1700			

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Checklist

Use this section to check for understanding. The checklist includes the main points covered in each of the topics. **Ask yourself:**

Event Design	
What are the Core Values for my event?	
Is everyone agreed on those Core Values and the direction we are heading?	
Can the Core Values be easily communicated to others?	
What are the unique selling points for my event?	
What design elements in my event create a point of difference from other events?	
Event Planning	
What systems do we have in place for my event?	
Can the information contained in those systems be accessed and used easily?	
If I am run over by a bus, can anyone pick up the management of my event where I left off?	
Does everyone involved in the event know what is required of them and by when?	
Have I forgotten anything?	
Event Budgeting	
What financial controls are in place for my event?	
Can I utilise the budget in the planning of my event?	
What can I do if the income isn't enough?	
Have we looked at our target market and the current environment and pitched at that level with our pricing?	
Have we broken any budget rules?	
Event Management	
What role do I play at my event?	
What can I do to increase my efficiency and that of the event crew?	
Have I allocated time for myself to 'do nothing' at my event?	
Have I planned how the day will run for the event team, the suppliers and the volunteers, and not just the programmed activity for my audience?	
What have I learned from observing my events at a distance?	

Pathways to a Formal Qualification

As evidence of your participation in this workshop, you will receive a Statement of Attainment for the **Plan and Program Events** module, which will count towards the ***Course in Creative Volunteering***, a nationally recognised short course for volunteers.

This workshop has been developed to align with the nationally recognised Units of Competency **SRXEVT003B Coordinate Events** and **CULMS406A Deliver information, activities and events**

The workbook (with the completed, signed exercises) can be presented to a Registered Training Organisation as part of your supporting evidence for Skills Recognition. (Skills Recognition is also known as Recognition of Prior Learning or RPL.) Although this workshop only introduces the subjects covered in these units, it does give an indication of the skills and knowledge that you will need to demonstrate.

Completing this module and the four core modules for this short course will count as credit for the *Introduction to Festival and Event Management* workshop which articulates with the Graduate Certificate of Tourism (Festival and Event Management) offered by Flinders University in South Australia.

Putting together a portfolio of evidence

To assist you with compiling a relevant portfolio, the following information is provided. *However you must check this with the training organisation.*

The assessor will look for evidence of your knowledge of coordinating special events for an organisation and in particular that you are able to:

- Identify gaps in the market for the delivery of special events
- Plan, budget and set timelines for a special event that is in line with the goals and objectives of the organisation
- Coordinate the activities of team members during a special event
- Develop contingency plans to be implemented in the event of a deviation from set operating procedures during the special event
- Prepare reports detailing an assessment of the special event
- Finalise financial accounts and prepare financial records for inspection by an auditor.

The types of evidence you can present would usually include:

- Certificates from relevant education or training courses
- Work products such as reports, event schedules, planning documents
- Third Party reports such as a reference (from an appropriately qualified person) that outlines the skills, qualities and experience you possess *that are relevant to your application*

NOTE: It is important that you discuss the requirements for Skills Recognition with an assessor from the training organisation.

References

This is a list of all the sources used in writing this workbook You may want to use these items as starting points for further research.

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- Ven Der Wagen, L (2001) *Event Management for Tourism, Cultural, Business and Sporting Events*, Hospitality Press, Melbourne
- Wigger, G. (1997) *Themes Dreams and Schemes*, John Wiley, New York
- www.eventclicks.com
- www.vem.com.au

Useful Websites

- | | |
|----------------------------|--|
| Australia Council | www.ozco.gov.au/resources |
| Australian Museums On-Line | www.amol.org.au |
| Volunteering Australia | www.volunteeringaustralia.org |

Other Useful Sources

Audio Technology, Alchemedia Publishing (periodical) www.audiotechnology.biz

BizBash Event Style Reporter (periodical) PARS International www.BizBash.com

Connections – Professional Audio and Visual Technology, Connections Publishing (periodical) www.conpub.com.au

Special Events Magazine, Primedia (periodical) www.specialevents.com