

Module 3

The Event Planning Process

In order to organise tasks properly the Event manager must break down the event into phases. These phases will help the event planner complete each task in a timely manner and prepare for the next phase to keep the work running smoothly.

1. Initiating

The Event manager and the sales staff typically begins with initial phases of an event.

2. Planning

Planning the event is one of the most crucial parts of the management process. In this step, you will plan for everything you know will happen. In addition, you will try to identify issues that may arise unexpectedly and plan ways to resolve them. With time and care, these plans will allow your staff to know the sequence of events and also quickly react to chance situations.

3. Executing

During this phase, the plans you created are executed.

This phase doesn't exclusively occur during the event; it begins as soon as the plan has been put into action.

4. Monitoring

Monitoring occurs during the entire event process. Everyone needs to be responsible for observing the progress and following the event plans, but the Event Manager should be responsible for monitoring and making decisions that affect the course of the event.

5. Controlling

Controlling takes place during the entire event. Using the observations made during the monitoring process, Event manager will make decisions and adjustments to event plans.

6. Closing

The closing of the event begins when the client signs the finalised plans for the event. It's the process of passing the finalised "product" to the client. In the Event Management industry, the "product" includes; the plans for the event, the performance of the event, and any correspondence done after the event.

6.1 Clearing of the Event

- a) Cleaning begins;
(Litter picking, bagging, washing up, deal with laundry and linen, move items to central collection point)
- b) Clear down small items;
(Stocking and boxing of consumable small items, loading of transport for small items i. e may include removal of rubbish)
- c) Bump up equipment and furniture;
(Technicians, caterers and media crews remove their equipment etc.)
- d) Cleaning and waste disposal;
(Collection of solid waste, recycling collection, emptying of tanks)
- e) Removal of utilities;
(Stripping out of telecoms, electricity/ gas, removal of temporary water supply generators etc)
- f) Removal of structures;
Removal of rope-work and crowd barriers, tents.
- g) Handover and site restoration;
(Removal of final waste skips, wash downs, check course for damage, green keepers begin work on

areas damaged by heavy use and wear and tear from the public tramping)

1. Initiating

There are a number of tasks that go into initiating an event. Most of these tasks are completed by a sales representative, event manager, producer, or helpers.

The initial contacts with a client may come in many forms. The type and length of the communication depends on the size of the event, level of experience the client has with event planning, and the way the Event Management Company is organised. The less experience the client has, the longer the pre-event meetings will be. Your participation in these meetings might be as little as taking notes and answering questions to as much as going on site visits and holding meetings with clients to explain the details.

Typical Timeline of Client Contacts:

1. Email (No other negotiations may be necessary with experienced clients)
2. Phone call
3. Conference call
4. Meeting Pre-conference meeting (Pre-con Meeting)
5. Site visit
6. Follow up meetings

7. Pre-Show meeting
8. Changes during the show approval
9. Closing communications

An RFP or initial conversations typically record this information:

- What is the client's contact information?
- What are the client's goals for the event?
- What type of client is it?
- What is the event's profile?
- What are the client's goals?
- What does the client have to lose or gain with the success of the event?
- May I contact the client directly with questions or do I need to go through a point person?
- How will the client participate in the meetings?
- Who makes the final decisions?
- Who is the point person responsible for approving changes during the event?
- What are the presenter's requirements?
- What are the presenter's equipment needs?
- What size is the event?
- Is the event a conference or meeting, or does it include an exhibition?
- What is the general event schedule?
- What is the attendee profile?
- How many staff members will work at the event?

Initiating an event can be a long process which will vary, depending on the amount of assistance the client needs and your level of involvement. You may sit in a six-hour meeting and only answer two questions. The information you gather at the meeting will help you through the entire event process. The quality of the information collected in these initial contacts can provide a strong base for the rest of the event planning process.

2. Planning & Executing

2.1 Creating Plans

Successfully creating plans depends on the quality and quantity of client information collected during the initiating phase. This information will help you begin the planning phase of the process. The purpose of the planning phase is to create plans to achieve the goals you set for the event.

2.2 Scope Plan

Once you know the maximum number of event attendees, resources and space, you can create a plan to manage the size of the event. Managing scope can be a balancing act between managing the client's expectations and keeping the event within a budget.

2.3 Cost Plan

Once you know how much the client and your company will spend on the event, you should create a cost plan. The results of cost plans are budgets. Cost plans must consider both the costs of the resources and the costs that may occur as a result of decisions made during the course of the event.

2.4 Staffing Plan

Once you know the schedule, you can begin forming a staffing plan. List all the tasks that need to be accomplished at the event, then list the skills required to complete these tasks. Look at the schedule; there will be times where you will need more than one person to complete all the tasks scheduled for that time. Create a list of people with what necessary skills you will need at specific times. This will give you an idea of how many people you need and what their schedules should be.

2.5 Quality Plan

Quality plans should always focus on presenting the client with the highest quality service within the scope of the event. This can be done by listing goals for quality of service. An example of a goal may be to have a tech available to every presenter during every session. The quality plan can tie into the staffing plan. For example, if

you were to hire people with specialised skills to operate the equipment rather than giving someone a crash course right before the event, your plan may increase the quality of the event.

2.6 Communications Plan

Plan the chain of communication. If there is a change, who needs to know about it? If a change occurs, everyone involved should know who to inform and how it will affect the event. The communications plan specifies how this is accomplished.

2.7 Risk Management Plan

Create plans to deal with factors that may threaten the success of the event, or the project. Next decide what risks are more likely to happen and have the most impact on the event and prioritise them. Plan how to respond to each risk as it would occur and reduce any risks that you possibly can. This plan begins a continual process of checking and monitoring things that can occur throughout the event.

2.8 Procurement Plan

Once you know how many resources you need to complete the event, create a procurement plan. Determine the amount of things you must purchase or

rent, then determine when and how you will obtain them. This plan may encompass signing contracts, comparing costs, selecting providers, and closing contracts.

2.9 Schedule Plan

Every event is different. Some events have people who will tell you where to be and when. Others will tell you what they want and leave it up to you to schedule everything. The scheduling plan is created for two purposes- to run an efficient event and meet the client's expectations. To meet these expectations, this plan encompasses the other plans as a guide to ensure a successful event.

Creating each plan will help you identify tasks you need to perform to achieve each goal. Follow your plans and revise them as needed to keep your actions and decisions on the correct course.

3. Monitoring

Each phase can be repeated throughout the event's life cycle. You may find yourself monitoring and controlling during the planning phase and the closing phase. The phase structure hasn't been created to force you to perform tasks sequentially; it simply helps you to organise the tasks to perform them more efficiently.

4. Controlling

Controlling is controlling the changes to the project's scope". Controlling the scope of an event occurs when anything is added or taken away from the finalised event plan. Each time you think about adding equipment to the setup that was not originally planned, you are controlling the scope of the event.

To successfully manage the plans:

- Keep the event within the scope identified in the RFP or scope plan
- Verify that all your resources or activity attributes are onsite.
- Review all schedules prior to the event including equipment schedule, operator schedule, production schedule, script, and technical rehearsal schedule.

Live Events Project Management and Budgeting

Conducting a Site Survey

In the RFP or during pre-event communications the client's goals and expectations are translated into a general equipment list by a sales person or an AV technician.

It is important that a skilled AV professional conducts the site survey to prevent mistakes and repeated visits to the

site to gather more information. This professional must create a very specific equipment list from the details gathered during the site survey. The equipment must be selected to meet the goals of the client and work well within the venue.

The person responsible for approving changes should be identified during the initiating phase. This person's contact information must be available to the AV technician on site so that they can make necessary changes as quickly as possible. A standard approval procedure for making changes to the setup must be in place before the event begins and communicated to everyone on staff.

- ❖ Make contact with onsite personnel
 - Gather contact names and telephone numbers, and email addresses.
 - Inquire about the facility rules.
 - Ask about outside vendor contract requirements.
 - Find out what the liability insurance requirements are.
- ❖ Inspect and review loading dock procedures.
- ❖ Verify access to the event space
 - Measure door heights and widths to assure accessibility for your equipment.
 - Measure the dock height.
 - Measure any ramp grades.
 - Assess the need for ramps, dock plates, or forklifts.
 - Ask about dock hours and restrictions.
 - Ask about city or hour, or time restrictions for trucks on streets and docks.

- Ask about the security of the dock.
- ❖ Determine the accessibility of the elevator by measuring its interior and door.
- ❖ Determine accessibility to the event space by measuring all doorways and hallways.
- ❖ Ask for a map of the interior of the building to record the path to the event space. Determine the most efficient interior route to take when moving equipment into the room(s).
- ❖ Contact the security personnel, and ask them when they work, which doors are locked, and when you can access the rooms.
- ❖ Determine city or time restrictions for trucks on the street and docks.
- ❖ Inspect the event space to determine:
 - Ceiling height
 - The height of the chandelier and soffits
 - The sight lines
 - Drawing availability
- ❖ Note the location of all fire exits.
- ❖ Meet with riggers and learn about the specifications and locations of the rigging points.
- ❖ Investigate functionality of the house light controls.
- ❖ Learn how to operate the lights and electrical system.
- ❖ Determine a safe power distribution path.
- ❖ Locate and test telecommunication connections. If necessary, meet with the telecommunications specialists and arrange for service that you need.

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- ❖ Fill out any site survey forms your company may provide. If your company doesn't require any forms, keep detailed notes on all the observations you make instead.
- ❖ If union members are used, determine what tasks they may not be permitted to do.
- ❖ Conducting a site survey is very important to the success of the event. It helps you determine what equipment to bring and how to smoothly install it into the space. There are so many important details that need to be attended to during this step it can be easy to forget one. Create a checklist, like this one, of all the tasks you must accomplish during the survey. That way you will avoid the expensive prospect of returning to the site multiple times for more information you simply forgot to gather.

Site Survey Documents

Onsite Personnel Contact Information

1) Contact Name		3) Contact Name	
Contact Job title		Contact Job title	
Telephone		Telephone	
Email		Email	
2) Contact Name		4) Contact Name	

Event Management

Contact Job title		Contact Job title	
Telephone		Telephone	
Email		Email	

Typical Facility Rules

- ☐ No alcoholic beverages on site
- ☐ Smoking is not permitted anywhere on the property.
- ☐ No cameras and recording devices on the property
- ☐ No re-selling of tickets
- ☐ No selling of merchandise not approved by the facility
- ☐ No foul or abusive language or inappropriate or unacceptable gestures
- ☐ Only use gaffers tape in the facility .You are responsible for any damage you do to the facility.
- ☐ No bringing guests in during an event
- ☐ No weapons
- ☐ No animals except guide dogs

Managing Client Expectations

- Build a relationship with your client through service and personalised contact.
- Ask the client personalised questions to understand their expectations.
- Aim to exceed your client's expectations, without exceeding the scope of the event.

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- Give the client your contact information and be available for them.
- Communicate both good and bad news to your clients.
- Respond in a timely fashion.
- Communicate before, during and after an event.
- Set limits and communicate them to the client when you have reached the limits.

After the pre-event meeting, respond to all inquiries as soon as possible with thoughtful and considerate communications. Follow up with the client after the event to make sure you met their needs. Remember that many client complaints stem from lack of continued communication between your company and the client.

Sticking to a Budget

Client's expectations can often exceed the limits of what is physically possible and what is within the budget. When their expectations begin to break the laws of physics and the budget, you need to gently and tactfully bring them back down to reality. During pre-event talks the client may list all the equipment they want to use. As they describe what equipment they want, you can use your company's price sheet to keep a running total. Once they are done listing the equipment, you can total the charges and check with them; make sure your figure matches what they expect to pay. This method of communicating

the financial status of the event before you send them an invoice will help you to manage expectations.

Scheduling

The schedules you create will be part of larger schedules created by the producer, event organizer, sales staff, or client. Changes in their schedules will be reflected in your schedule. Keep the lines of communication open during the creation of these schedules. Your schedule will need to be constantly monitored, reviewed, modified, and updated during the event. Use the plans you created to guide you as you create the schedules. During the scheduling process, allocate resources to meet the requirements of the plans and thus the goals of your client.

Creating Plans Using Milestones

List the milestones you must reach at the end of the event.

Remember the plans you created earlier:

- Scope Plan
- Schedule Plan
- Cost Plan
- Quality Plan
- Staffing Plan

- Communications Plan
- Risk Management Plan
- Procurement Plan

Examples of Milestones:

- Equipment arrives for concert in main ballroom
- Equipment set up in main ballroom
- Modifications to the stage completed

“Defining the schedule activities involves identifying and documenting the work that is planned to be performed”

For example:

- Transport equipment to the venue
- Set up equipment
- Operate equipment
- Tear down equipment
- Transport equipment back to the warehouse

These are known as work packages, and they will differ depending on the scope of the schedule being created. For example, if you wish to schedule the entire event planning process including the sales staff’s activities, you should begin identifying work groups at that level.

Once you have identified the work packages that you need to schedule, break these packages into smaller

components that can be scheduled. Allow enough time for each activity to be accomplished by the number of people you have available at the time.

Possible Scheduled Actives:

- Pull equipment from warehouse
- Load the truck
- Travel to the venue
- Unload the equipment
- Place equipment in the proper rooms
- Set up equipment in the proper rooms
- Test all setups
- Person A needs to be in room A to operate equipment A
- Person B needs to be in room B to operate equipment B
- Rooms A, B, C need to be turned at this time
- Rooms A and B can be torn down at this time
- All rooms can be torn down at this time
- All equipment needs to be torn down and packed up by this time
- All equipment needs to be loaded on the trucks by this time
- Travel to the warehouse
- Unload equipment

Once you have listed the activities you can begin identifying the activity attributes, which are details about each scheduled activity.

Site/venue layout and design

After selecting the venue, decide how to use it. Start by drawing up a venue or site plan and making any necessary changes. Include the scale, compass direction and prominent landmarks to assist users. The site map will become a major planning tool. It will be useful in communications with, staff, volunteers, committee members, suppliers, stallholders, performers, emergency services and attendees. Depending upon the size of the event, productions of different versions of the map may be useful, including a simplified one for attendees. Placing the site map on the event website provides a handy reference point for suppliers and deliveries. Executed properly, a site map can contribute to the smooth organisation of the event.

Many venues, such as indoor theatres will have existing venue plans with the stage area, fixed seating, toilets, parking and so on. Other venues such as conference centres may have flexible staging and seating and may supply computer generated (CAD) drawings of various configurations of the venue. These drawings will make the task simple.

Other venues, particularly parks and outdoor sites, require the event manager and the committee to make decisions on how and where activities will be placed. Begin by making a simple pencil sketch of the site and experiment with the placement of event activities and facilities. It is usually best to place similar activities together and make the site design compact.

Important factors to consider in creating a site plan include:

- Entrances for attendees and their proximity to transport and parking
- Placement of the stage to provide good viewing areas and sight lines for the audience. Often using land configurations will assist in creating a natural amphitheatre
- Access to power and water for the stage area, catering and toilets
- Adequate provision and use of shade and shelter
- The flow of people around the site, including adequate passage ways
- The placement of the stage(s) so as to avoid sound spill and interference with other activities
- The placement of revenue raising activities in high traffic locations to maximise income
- Access for deliveries and emergency services
- Placing of catering so that it is convenient for the audience and close to shade and seating

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- Placement of toilets and facilities so that they are discreet and removed from catering areas for health reasons.
- Placement of waste disposal bins in convenient places such as adjacent to catering areas
- Placement of information, first-aid, lost children's tent and security in central, highly visible locations
- Enclosures - natural and constructed
- Directional signage where needed
- The overall configurations of the venue to provide a pleasing and aesthetic experience for visitors.

Selecting, contracting and managing performers

'Headline' acts can be a major attraction and the main reason that people attend an event. **Performers can:**

- support and enhance the theme of an event
- broaden the appeal of an event
- animate an event
- stimulate social interaction
- entertain and enliven the event environment.

Checklist for selecting and managing performers

- Identify the roles or functions that performers will serve at the event
- Decide on the budget for performances

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- Research suitable performers and their availability, stage and equipment needs, fees, transport and accommodation costs
- Select performers that best fit the needs and budget for the event
- Negotiate carefully with performers or their agents matters such as payment and when this will take place, times and length of performances and their contribution to the promotion of the event
- Draw up a performance schedule including the times and length of all performances and rehearsals
- Request a written contract and make sure that it specifies correctly the details of the performance
- Take careful note of any special conditions or 'riders' before signing
- Issue a booking form to all performers, whether free or paid, specifying performance details, arrival/rehearsal times and any special requirements that apply to the venue or event
- Draw up a stage plan that meets the needs of all performers
- Communicate the stage plan and performers' technical requirements in writing to the stage manager, sound and lighting suppliers prior to the event
- From the performance schedule, draw up running sheets for key stage personnel and performers, and post them on the walls of dressing rooms backstage

Event Management

- Provide adequate backstage areas and dressing rooms, including toilets, clothes racks, mirrors
- And refreshments
- Make sure that performers are met and welcomed on arrival
- Ensure that they are well briefed on their role in the event
- Supervise sound checks and rehearsals
- Introduce main performers to the compare and discuss how they are to be introduced on stage
- Thank them after the performance and ensure that they are paid promptly upon receipt of their

Tax Invoice

Negotiating and contracting performers

If the budget can extend to paid performers, you can identify performers that are current and provide good value for money by:

- Observing performers at other events
- Discussing performance resources with other event managers
- Using entertainment agencies
- Researching performers' details on their websites
- Consulting the yellow pages phone book
- Advertising and auditioning performers
- Using local clubs for contacts.

Many performers have agents and/or managers who will provide biographies and photos of performers and examples of their work on audio and/or video tapes. They should also detail fees and provide specification or 'spec' sheets of the performers' staging requirements. Analyse the value of performers to the event and choose those most suited to the event needs and budget.

When negotiating with performers' agents, be careful to specify what you expect of performers and what they are required to contribute to the event. Negotiation of the fee and how this is to be paid will be required. This may be based on a flat fee, a percentage of ticket sales, or a combination of both. Generally a deposit will be required on booking with the balance to be paid at the end of the performance. Be aware that performers' contracts may include 'riders' - statements of things that you are required to provide in addition to the fee. These may include travel, accommodation and hospitality and may add considerably to the cost. Discuss issues such as rehearsals and sound checks which will need to be included in the performance schedule. Discuss the involvement of performers in promoting the event, eg through media appearances and interviews. Performers' agents will usually have a standard contract (see example attached) that you should read carefully before signing. If they do not, draw up your own contract, or a simple letter of agreement specifying the responsibilities of both parties.

This is the time to discuss and negotiate any special requirements including any specific material that you would like included in the concert program. The contract should specify the date, time and duration of the performance and any relevant insurance requirements. It should also specify the method and time of payment and any penalties for cancellation. Performers should provide event organisers with a Tax Invoice as close to completion of their performance as possible.

If you are signing performers' contracts, it is good practice to also issue a booking form, specifying the details of the performance and any conditions or guidelines that may apply to the venue or event. The booking form should also be issued to community performers so that they have a written record of the details of their engagement.

Conditions and guidelines that might apply to the event include:

- Performance guidelines such as noise limits, prohibited activities, restrictions on offensive or
- Discriminatory content etc
- Parking arrangements
- Rehearsal and sound check arrangements
- Public liability insurance requirements
- Property damage, repairs and cleaning
- Filming and media coverage
- Wet weather contingency

- Cancellation arrangements
- Facilities to be provided, eg dressing rooms, mirrors, ironing board etc.

How to Stage the Event

Most, if not all events, involve some form of staging. The prime purpose of using a stage is that performers can be seen well by the audience and have a protected and safe area to work in. Sound and lighting help to amplify their performance and can also be used to create mood and atmosphere.

Staging may range from a simple speech or prize giving to a full entertainment programme with bands, dancers, variety acts and a compare. The staging requirements may be very simple, involving only a small raised dais and a loudspeaker system or they may be quite complex involving a large stage, full sound and lighting plots and high quality equipment.

Whatever the level that is appropriate to the event and budget, staging can make or break the event. It is worth taking the time and effort to get it right so that all runs smoothly on the day. Good staging can contribute greatly to the theming and look of the event and to communicating with and entertaining your audience. Depending on the venue, the stage, lighting and sound equipment may already be provided and built in or you may have to provide everything from scratch in the case

of an open park or street. Most staging requirements, including the stage itself, sound and lighting equipment can be hired locally. Stages are often constructed from scaffold and wooden flooring, but there are now many purpose-built mobile stages for hire, depending on local resources and the budget. The back of a truck can be an adequate stage on some occasions.

Sound and lighting equipment is fairly technical and will usually require sound and/or lighting operators. The event manager does not need to understand the working of the equipment, but does need to be familiar with commonly used terms such as:

- Single and three phase power
- Mixing desk
- Speaker stacks
- Old back speakers
- Lighting trees
- Lighting gels
- Spotlights
- Par cans
- Lighting trusses.

It is the event manager's job to understand the needs of the performers and to communicate these to the stage crew so that they can provide and operate them. This will include not only matching the stage equipment to the

needs of the performers, but making sure that there is an adequate power supply, backstage area, dressing rooms, set-up and rehearsal times. This is best accomplished by identifying all the needs of your performers, and then preparing a stage plan and run sheets that list rehearsal times and what is to happen on stage during the performance. Unless the event is very small, a stage manager will be needed to take charge of this area of operations.

The event manager will;

- Decide on the programme of performers, speakers etc
- Arrange the items in this programme for maximum contrast and effect
- Consider the stage decorations that you want to use to dress the stage for your event. These may
- Include banners, sets, props etc.
- Decide whether the event is large enough to need the services of a stage manager. If so, consult with them on the following steps, or have the stage manager implement them under direction
- Consider the individual staging needs of each of the acts. A band will usually be able to provide a specifications sheet, detailing their stage set-up, and sound and/or lighting requirements. Dancers may need a certain amount of clear space and a particular surface to dance on, as well as a tape deck or provision of live music.

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- Draw up a stage plan that accommodates the needs of all acts. It may be necessary to 'strike' or clear the stage between acts, but be aware that a band can take some time to set up and to move. The flow of props and equipment on stage may affect the order of the programme
- From the stage plan you will know the size stage required. If you are using a venue with an existing stage compare this with your requirements. If it is not large enough, consider extending it or amending the stage plan.
- If any additional equipment is required, obtain quotes from specialist suppliers. This may include audio-visual equipment such as computers, data projectors, video projectors, slide projectors and projection screens, or special effects such as pyrotechnics or lasers. Back up equipment such as a generator may also be required.
- Consider staffing needs on the day. The sound and/or lighting company will usually be able to provide operators. Additional staff or volunteers may be needed to welcome and supervise performers and to assist with stage management
- Remember to provide for support systems such as power requirements, dressing rooms, passages and access to the stage and refreshments for the performers
- Remember also to provide for stage safety. It is your responsibility to provide a safe working environment and this should include taping down of cables, wet

weather contingency and the provision of adequate stage security

- A schedule for all aspects of the staging should be prepared, from arrival and installation of equipment to rehearsals, sound checks, performance, shut down and dismantling of equipment. Not everyone will need to know the same amount of detail, and you may need to draw up separate run sheets for performers, stage management, sound and lighting operators
- You should now be able to sit back on the day of the performance and watch everything run like clockwork. Be on hand to welcome performers and VIPs and to provide back-up for your team in any crisis or emergency.