



MANAJEMEN EVENT



2020

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Introduction

Why this guide has been produced

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

Who the guide is aimed at

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

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

How to use this guide

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

A. GENERAL PLANNING

Good planning is a continuous process and good plans should be adaptable and flexible – they require a solid foundation and a straightforward structure. This first section is a step-by-step guide, designed to help you get started in the initial stages of event planning. Areas covered in this section include: 1) the event concept; 2) defining and communicating the event's vision and mission; 3) setting objectives; 4) the SWOT analysis; 5) deciding on event dates and venues and; 6) the 'Event Action Plan'.

1) The Event Concept

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

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

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

- If the event is unique or if it's duplicating an existing event
- If there is a gap in the market that the event can fill
- If there is a demand for such an event
- If the resources are available to deliver it

- If the community, the local authority and relevant sector body will support and 'buy into' the event
- If it will be financially viable
- If it will be sustainable in the longer term
- If it has potential for growth
- If there will be any legacy

Always Review and Revise

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

2) Communicating the Vision and the Mission

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

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

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

3) Setting SMART Objectives

You should also be able to define and communicate your event's objectives. Your objectives should help deliver your vision and mission. Objectives need to be clearly set out and should follow the SMART principle: Specific, Measurable, Achievable, Relevant and Time-Based:

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

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

- Event Growth
- Event Quality
- Event Sustainability

- Sector Development
- Audience / participant satisfaction
- Economic Benefit
- Tourism Development
- Social Benefit
- Educational Development
- Community Development

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

At the beginning of the planning process if you undertake a simple 'SWOT Analysis' it will help determine the Strengths, Weaknesses, Opportunities and Threats (SWOT) in relation to the event. This will help you shape your plans. Looking at internal and external influences that may have a positive or negative impact, consider the strengths and weaknesses of the event and how these will affect your ability to deliver it. Repeat the same exercise for opportunities that the event can capitalise on, and the threats that could undermine the event or elements of it. Consider the following points:

- **Event Management** - experience within the organisation, staffing numbers and structure, financial stability, viability of planning, confidence of funders, etc
- **Partners/Clients** – the support they can/cannot provide: finance, influence, resources, etc
- **Climates** – social, economic, cultural and political
- **Event Benefits** – what the event offers, its 'Unique Selling Point' (USP)
- **Potential to Develop and Grow** – factors that will assist or hinder this
- **Other Factors** – competition, technology, legal, environment

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

Lead Time

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

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

The Date

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

- **Nature of the Event** – is it an outdoor event; does it need to be staged in a particular season; is its location intrinsic to its success (i.e. does it have to be in a particular venue, city/town, location, etc)?
- **Weather** – what are the probable weather conditions at your preferred time of year; will inclement weather affect the event; are there contingency opportunities available?
- **Target Audience** – who are you hoping to attract to the event: is this more achievable if it is staged at a particular time of year, holiday time, at the weekend, mid-week, etc?
- **Clash Diaries** – what else is happening at the chosen location/venue; is the event diary overly busy? It's worth talking to your local authority, VisitScotland network office and other appropriate organisations to check what else is planned for your area at the time. You should also check to see if your event clashes with any similar events further afield that may also attract your target audience or participants.

- **Complementary Activity** – are there any complementary events or activities taking place at the same time that could assist your event? Could you work together for mutual benefits?
- **Competition** – are there other similar themed or scaled events taking place that are targeted at the same audience? Is there room for your event in the marketplace at your chosen time of year?
- **Resources** – are other major events (football, concerts, conferences, etc) taking place at the same time that will impact on the resources required to stage your event (i.e. the availability of accommodation, staff and volunteers, hired equipment and facilities, venues, support from emergency services, local authority, etc)?
- **Other Factors** – don't forget to check out any other influencing or relevant issues e.g. road or building works planned in the vicinity at the same time as your event.

Shoulder Periods

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

The Venue

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

- **Event History** – where has the event been held in the past; what were the pros and cons of holding it there (remember – never underestimate the impact of an existing event venue: its location and how it is perceived may well be a powerful tool in drawing audiences/spectators/participants); are there any benefits in changing venue; are there other elements being added to the event that require additional facilities or space?
- **Venue History & Reputation** – what venue(s) fit with the qualities and principles of the event; are certain venues synonymous with your individual event type; will a particular venue give added kudos or be detrimental to the event?
- **Location** – does the event need to be located in the centre of town; does the location have potential to expand with the event; are there necessary facilities nearby such as transport links, accommodation, etc?
- **Budget** – will the budget support the choice of venue; have all the possible costs been considered?
- **Conditions of Contract** – are you required to use the venue's own technical staff; does the venue insist on supplying catering and bar facilities; what type and level of insurance is required on your part and what is covered by the venue; what are the terms of payment; will any of these
- **Audience** – what capacity is required (this time and in the future as the event grows); is it accessible for people with disabilities or special needs; will your target audience identify with the venue?
- **Services & Resources** – what support can the venue offer (staffing, security, administration, production, bar facilities, toilet facilities, etc)?
- **Transport & Parking** – can staff and audience park at or near to the venue; are there good public transport links; can production and other services/deliveries unload and park as necessary at the venue; are VIP and disabled spaces available?

- **Timing** – can the venue accommodate the entire event requirements: event build, live event and take-down; is there a potential clash with other events or activity happening at the same time, before or after your event?
- **Permissions** – what permissions are required (landowner, licences, sanctioning, road closures, etc)?
- **Infrastructure and Layout** – what space is required for all aspects of the event (production compound, event parking, audience, staging, signage & branding, artists/competitors, press, exclusion zone, etc); what level of infrastructure do you require and what kind of work (if necessary) are you prepared to undertake to get the venue to a useable state?
- **Restrictions** – what are the venue opening and closing times (during the event build, live event, and take-down), do you have 24hr access; is there a corkage charge, administration charge, etc; can you display your sponsors' signage or will it clash with existing venue sponsors or suppliers?
- **Reinstatement** – who is responsible for clean-up, rubbish removal, reinstating street furniture, ground works, etc; what are the estimated costs; is a bond required to be paid in advance to cover the cost of damages to the venue or land?

The Event Action Plan

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

(most likely at the beginning of each planning stage). Key activities listed in your Event Action Plan may include:

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

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

for fundraising, etc. It's a useful approach to be able to show the entire activity timeline and also to be able to break it down into 'departments'.

B. BUSINESS PLANNING

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

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

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

- The event's vision and mission – i.e. what it ultimately aims to achieve
- Who the key stakeholders are, what benefits they will accrue and how the event fits with their strategies
- The relevant experience and track record of the organisers
- The event's background and an overview of plans for the current year
- The SWOT analysis (identify strengths, weaknesses, opportunities and threats)
- The audience/spectator/participant profile (existing and targets)
- Key objectives and achievement strategy for the current year

- A development plan – key aims and objectives going forward (beyond the current year)
- Marketing and communications planning
- Event requirements – staffing structure, facilities, services, venues, etc
- How much the event will cost – budget projections over 3–5 year period
- How will it will be paid for – identifying income streams
- Management and business controls
- Risk management and contingency plans
- Future considerations

Reviewing the Plan

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

C. PUTTING THE TEAM TOGETHER

At this point however, it's worth underlining that event organisers come in many shapes and sizes, including:

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

- Charities
- Governing bodies of sport
- Clubs and associations

The Event Team

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

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

The above list simply provides an example of the kinds of roles that may be appropriate to an event. It could be that your event requires a range of roles, a much expanded team, or maybe

just two or three people supported by volunteers to deliver all aspects of event management. Whatever the case, ensure that you are sufficiently equipped to meet the challenge. Once you've decided on the roles that you require, it's a good idea to draw up an organisational chart or staffing plan setting out the structure of your event team. This will help you demonstrate the chain of command. Here's an example of what this might look like for our 'X-Town Visual Arts Festival'.



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

your recruitment agreements in writing, ensuring that rates of pay (or basis of voluntary work) are clearly understood and accepted.

Legal obligations: For general information and advice regarding best practice and your legal obligations as an employer

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

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

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

Volunteers: If you are considering using volunteers to assist with the event, ensure that you are able to clearly specify what is required of them; the types of roles you wish them to perform; hours; training; incentives; who they report to; how to deal with incidents and an idea of what to expect on the day, etc. Volunteers need to be managed carefully and your relationship with them will be different to your relationship with paid staff. Remember, volunteers are giving up their time to work on your event and they are likely to have specific reasons for volunteering. To select and get the best out of your volunteers, it's a good approach to find out what they are looking to get out of the experience and to try to match their skills and personality with the appropriate role.

The Wider Team

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

These may include, for example:

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

Other Services

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

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

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

D. BUDGET AND FINANCIAL MANAGEMENT

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

Preparing your Budget

Your event budget is basically a projection of all income and expenditure relating to the development and delivery of the event. To help you manage event finances effectively it's a good approach to keep a 'live budget' on your computer – i.e. a spreadsheet that you update on a regular (daily/weekly) basis. Set up your budget in a package such as Microsoft Excel so that you have numeric functions to help you manage the financial data. The following template gives an example of the kind of entries that may be appropriate to your event, but your entries should of course be specific to your particular situation:

Live Event Budget – Summary

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

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

Budget Preparation Tips

- Ensure that you build appropriate contingencies into your budget.
- Present your budget clearly and make sure it is easy to read and interpret.
- Be realistic. Never include funding sources that are unlikely to materialise.

- If relevant – for example, if the event finances are processed through a parent organisation – ensure the cost centres you set up in your event budget (i.e. marketing, production, etc) integrate with the ‘parent’ accounts system.
- Each and every item of event income and expenditure should be recorded in your event budget.
- The complexity of your budget will depend on the size or nature of your event. If the budget is extensive, and you are employing a software package such as Microsoft Excel, it’s a useful approach to link worksheets to the front page ‘budget summary’ in order to keep a detailed breakdown of each line in the budget.
- State clearly if your budget is presented as NET (it does not include VAT) or GROSS (it does include VAT). Broadly speaking, if you are VAT registered and able to reclaim the VAT keep a NET event budget. If you are not VAT registered and therefore unable to reclaim the VAT keep a GROSS event budget. If in doubt, seek the advice of your/an accountant.
- Be aware of the VAT status of any income that you receive. For example, grants are generally not subject to VAT but commercial sponsorship is likely to be. Errors or misunderstandings can be costly.
- Ensure you understand your liability to pay VAT on ticket income and other sales.
- Be conservative with regards to ticket income targets. When entering a projected ticket income, ensure that you have worked out exactly how many tickets you would have to sell to achieve it. Remember to take into account any tax deductions, concession rates, group bookings or special offers and their likely impact on your target.
- It is important that you record the value of any ‘in-kind’ support you receive. However, to avoid getting your ‘in-kind’ values mixed up with the actual cash at your disposal, it’s advisable to keep a note of your in-kind support separately. If you do choose to show ‘in-kind’ figures in your budget, make sure you enter the value as an income as well as expenditure and mark both entries as ‘in-kind’.
- Always back-up and archive your budget as necessary. Ensure that you keep a record of which versions you have presented to outside parties such as funding partners.

Control Mechanisms

- **The Budget Holder:** It's advisable that one person is ultimately responsible for updating and managing the overall budget – ideally the event manager or producer. If others in the team are given authority for certain budget elements, set control mechanisms in advance and ensure they understand and agree the level of budget available to them.
- **Coding:** If relevant, set up an appropriate invoice coding system so that budget information can be easily entered (and filtered) in accordance with any existing accounts system.
- **Purchase orders:** Where possible, raise purchase orders. These not only provide a checking mechanism when passing invoices for payment, but they confirm to the supplier exactly what you want and when you want it. Ensure you add delivery details and contact telephone number, especially if the order is to be delivered to a temporary event site.
- **Processing invoices:** Depending on what already exists within your organisation, it's a good idea to put in place a system for approving invoices relating to the event. One control mechanism is to attach 'approval slips' to each invoice in order for the budget holder to code them, 'sign them off' and add any appropriate notes for the book keeper (or person who writes the cheques). Whatever system you employ, ensure that invoices do not get paid until the event budget holder has approved them and has updated the 'live budget' accordingly. The point is to keep on top of all event expenditure.
- **Petty cash:** Ensure that all petty cash spend is factored into the budget. When issuing petty cash in advance, ensure that you do so in exchange for a signed petty cash slip (you can make your own or buy them from stationers). Ensure that receipts for all petty cash purchases are collected, numbered and properly coded. It's useful to provide a petty cash template for those in receipt of cash. Here's a sample template for you to adapt to your purposes.
- **Good record keeping:** Keep all your financial information on file and at hand. Make hard copies of your key documents. Back up all your computer files to CD or DVD on a regular basis.

- **Cash flow projections:** Ensure that you plan your cash flow effectively. The lack of available cash could well bring your operation to a halt and put the whole team and event under unnecessary pressure. A simple template is provided on the next page. Remember that entries in the cash flow will be GROSS (i.e. they will include VAT). If you are VAT registered and the event is not the sole business of the company, your VAT payments/claims should be factored in to your overall company cash flow. Again, if you are working within a wider organisational structure, ensure that you plan your cash flow with the finance department.

Things to Remember on Site

Cash

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

Fees

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

Security

Ensure you put sufficient security measures in place that take into account the amount of cash you will have on site and the safety of those handling it. Think through the various scenarios pertinent to your event. How will you monitor and store your takings on site? Who will be responsible for handling cash? Is training required? Are staff adequately protected against

possible attack? Do you need to arrange a Night Safe Service with your bank? Remember to check your insurance policy to ensure you have the right level and type of cover.

E. MAKING IT ADD UP

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

- a) Is it financially viable?
- b) Is it sustainable? (if it's not a one-off proposition)

Revenue Plan

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

Potential Funding and Income Sources

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

- Ticket Sales (i.e. audiences, spectators)
- Participant Entry Fees (i.e. sports events)
- Public Funds
- Commercial Sponsorship
- Trusts and Foundations
- Concessions & Franchises
- Merchandising
- Showcase, Demonstration and Information Stands
- Advertising
- In-Kind Support

➤ Other Activities

Ticket Sales

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

Entry Fees

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

Public Funds

Events supported by local authorities are usually prioritised for support by EventScotland. The reason for this is that events supported locally are more likely to be sustainable in the long-term as they fit with local strategies. It is possible that your local authority operates an events fund or that funds may be available through departments such as 'economic development', 'culture and leisure services' or through sources such as a local 'common good fund'.

Increasingly local authorities are developing events strategies and employing events officers to co-ordinate their involvement and support. When enquiring about the potential of support from your local authority, the best place to start is by asking if there is an events officer or other appropriate (culture or sports) contact that can help route your enquiry. Aside from financial support, the local authority may also be able to provide assistance with aspects of the event organisation by supplying services in-kind, advice, inclusion in 'What's On' guides, etc. When filling in application forms, make sure you:

- Fully understand the guidelines and eligibility criteria. If you don't understand something, don't be afraid to phone up the fund manager to seek advice.
- Read each question thoroughly and answer it specifically.
- Give yourself enough time to complete your application and to assemble all the required supporting documents. A shoddily presented or incomplete submission will not do you any favours.
- Don't miss anything out that you feel may be of importance, but equally don't supply irrelevant information – remember someone has to assess your application in detail and will not appreciate excess or repeated information.
- Don't leave any questions blank and always present your application in the format that is requested.
- Include some event photographs, a print sample and positive press comments or endorsements in order to provide additional context to your application.
- Do not assume that the assessor or assessment panel have any existing knowledge about your event – make sure your application paints a clear picture for them.
- Get a friend or colleague to proof read your application – fresh eyes are more likely to spot errors or gaps in information.
- Stick to the deadline.

Commercial Sponsorship

Put simply, when a company sponsors an event it usually means that it provides cash in exchange for a number of benefits. Trying to raise commercial sponsorship is likely to take up a

lot of time. You may elect to keep the process in-house by allocating yourself or a member of the team to raise the sponsorship or you may decide to draft in the services of a freelance sponsorship professional with existing contacts. If employing the latter, expect to pay a retainer fee plus a percentage of the revenue achieved. These outgoings should be negotiated in advance, agreed in writing and included in your budget. However, because the professional will have existing contacts, the process can be more effective than if facilitated in-house. To assist in your quest for sponsorship, we have included a section titled 'Sponsorship Proposal' that can be found at the end of this chapter.

Charitable Trusts and Foundations

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

Concessions & Franchises

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

Merchandising

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

Showcase, Demonstration and Information Stands

Some companies like to sample their products direct to the target consumer at events. Others, who have no product, but are promoting services or causes sometimes take information stands at events. Be careful to ensure that any product/service on offer is in line with the event's ethics and target market profile. As a general rule, the higher the profile of the event and the larger the audience, the more you can charge. Before targeting appropriate companies, make sure you clearly understand what you have to offer and how much you will charge for it. Be careful that competing brands do not clash and any demonstrating companies do not end up getting more exposure at the event than your main sponsor (who is likely to have paid considerably more to be involved).

Advertising

If your event has a printed programme, advertising space could be offered to local or relevant companies, or to those who have showed an interest during the sponsorship drive, etc. Other advertising opportunities could include the sale of banner positions at the event and/or on the event website. If you have sponsors, ensure that no competing companies are advertising in your publications unless you have the agreement of your sponsor. If you have a commercial sponsor, it may also have sister brands that may be interested in taking advertising with you.

Licensing & Broadcasting Rights

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

What Do Sponsors Look For?

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

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

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

- **Title Sponsorship** – naming rights to the event (i.e. Baxters Loch Ness Marathon & Festival of Running).
- **Exclusivity** – a guarantee that they will be the sole sponsor or the only sponsor from their particular market sector.
- **Brand Exposure** – presence on all event literature, signage, merchandising, website, etc.
- **Branding** – banners, signage and display boards, etc at the event. Remember that the creation of branding materials can be expensive. Your sponsor may be willing to pay for this element or they may already have existing materials. At the start, set out what you

are prepared to pay for and what the sponsor has the opportunity to provide, and present it all in an agreed branding plan or schedule. For televised events, the opportunity for exposure is a major benefit.

- **Media Exposure** – opportunity to host/comment at press launch, placement of specific articles in press (a media sponsor may be able to guarantee coverage for other sponsors), mention in all press releases, etc.
- **Advertising** – logos/mentions on paid-for advertising, advertising in event programme/publications, etc.
- **Merchandising Rights** – opportunity to sell their product.
- **Sampling Opportunities** – opportunity to give away samples of their product.
- **Tickets and Merchandise** – agree the level of complimentary (or discounted) tickets and merchandise available. It is likely that sponsors will want to invite staff and clients.
- **Networking Opportunities** – at the event and at any pre or post event business or hospitality opportunities.
- **Long-term Relations** – the opportunity to secure a 3–5 year relationship.
- **Hospitality Opportunities** – exclusive sponsor's party or corporate box/pavilion for their clients, staff, etc.
- **Product Creation** – the opportunity to provide a branded product, gimmick, toy, etc exclusively for the event.
- **Additional literature** – the opportunity to distribute additional event or company literature.

The Sponsorship Proposal

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

companies may have specific guidelines to follow. If this is the case, go with their required format when writing the proposal.

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

Confirmation

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

Branding Plan

For larger events with a wide range of branding options, it's a good approach to produce a 'branding plan'. This is basically a plan that shows the locations and specifications of all your sponsor's branding. Sponsors generally want to be very visible at the event and prior agreement of branding designs, positioning and sizes is essential if you want to keep your sponsor on board. Ensure you clarify what opportunities are provided as part of the sponsorship package and who is paying for what (never spring an unexpected branding production or erection bill on your sponsor). It's good practice to arrange a 'site walk' with your sponsor(s) prior to the event opening – this will ensure that they are happy with their branding and allow any last minute adjustments before the event begins.

The Tendering Process

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

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

Either way, the tendering process is much the same.

Step 1

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

Step 2

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

- **Timescale and Return Details** – state clearly by which date and time the tender must be returned, in which format, number of copies (if more than one evaluator) and the return address and contact details.
- **Project Description** – details on the event, date, timings, nature, audience profile, etc.
- **Statement of Requirements** – specify what it is you are looking for. If you are not sure exactly what will be required and are asking for companies to professionally advise you on what you will need, provide all relevant data upon which they can base their recommendations. The more information you can give at this stage, the more time you may save answering questions later.

- **Evaluation Criteria** – you may wish to evaluate submissions based on a number of factors and not just the bid/cost amount. In this case, weight these elements in order of importance.
- **Terms & Conditions** – include all Terms & Conditions you require the supplier to adhere to such as provision of services, delivery dates, non-collusion (it is important that each company agrees that they will not collude with any other company taking part in the tendering process), confidentiality, data protection, liability, indemnity & insurance, termination details, VAT liability, etc. Ask for their agreement to the Terms & Conditions by signing the appropriate box on the return submission.
- **Tenderer's Submission Document** – provide a document (ideally electronically) for each supplier to fill out and return in response to your tender document. Base your template on the Evaluation Criteria you previously set out.

Step 3

The next step in the process is to Evaluate. The fairest and most impartial way of evaluating is to create a scoring system based on the Evaluation Criteria you have already set out.

Step 4

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

F. THE PROGRAMME

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

- **Main entertainment/event focus** – in line with the theme of the event, the main entertainment or event focus is what attracts the audience

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

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

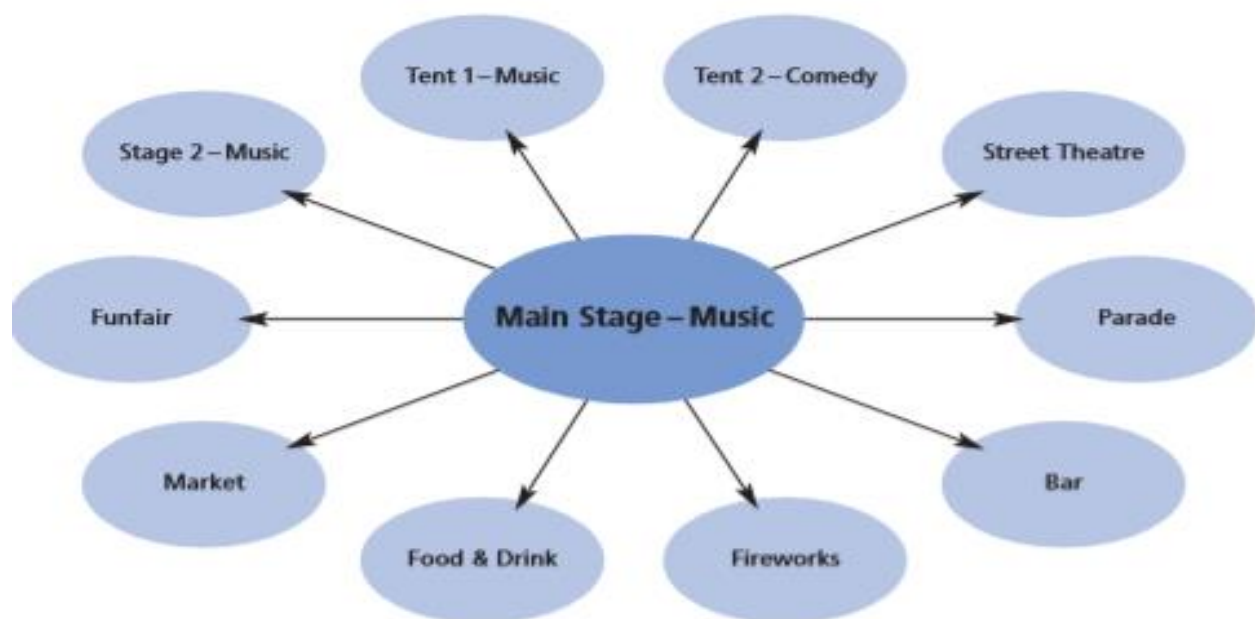
1) A mid-scale multi-arts festival

2) An athletics/running festival

Once you've established the different programme components that you'll require, you can focus on the specific acts/shows/features, etc that would be appropriate for the event.

Remember, a strong programme content and structure are essential to the success of the event.

1) A mid-scale multi-arts festival



2) An athletics/running festival



Timing the Programmed Activity

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

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

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

G. LEGAL ISSUES

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

Areas you should consider as a minimum include:

- Organizational Structure and Legal Status
- Event Ownership
- Contracts & Agreements
- Licences and Permissions
- Disability Issues
- Equal Opportunities
- Data Protection
- Insurance

Organizational Structure and Legal Status

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

Unincorporated Association

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

unincorporated associations may find it more difficult to attract funding from third parties. This kind of organisation should only deliver events involving a very limited risk

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

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

Event Ownership

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

Sanctioning

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

sanctioning an event is to ensure that it is delivered to a standard agreed with the governing body. In return for sanctioning the event is usually required to provide financial return to the sanctioning body – either a lump sum and/or a capitation fee. sanction provides the legal authority to run/host an event. It may also provide additional benefits to the event organiser such as access to:

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

Contracts & Agreements

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

Agreements with Key Partners

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

Issuing Your Own Contracts

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

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

Licences and Permissions

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

authorities, so it's best to take their advice early in the planning stages of your event.

Appropriate licences may include:

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

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

Disability Issues

There are two Acts of Parliament which introduce and provide a means of enforcing rights preventing discrimination against disabled people. When planning your event, ensure that you are abreast of the requirements regarding disabled access. Event organisers could face legal challenges from disabled people unable to access an event. Making events accessible for disabled people is not just a legal requirement however.

Equal Opportunities

If your organisation is employing staff you must be aware of equal opportunity legislation. Regardless of race or ethnicity, disability, gender or sexual orientation, age or religion, legislation is continually being introduced and developed which improves equal opportunities for all

Data Protection

The Data Protection Act 1998 regulates the processing of personal information, i.e. data about living people who can be identified from that information. The Act covers data such as mailing lists and records on staff. It applies to information you hold on a computer and to some paper-based records.

Child Protection

Any event staff involved with looking after children should have the appropriate approval from Disclosure Scotland.

H. INSURANCE

A 'broker' will arrange insurance on your behalf. It is their job to find the best deal for you from the various appropriate underwriters in the marketplace. It is likely to be counter productive to ask a range of brokers to find you the best quote as each may present your case differently (bringing issues of misinterpretation) to the limited range of underwriters available. This tends to cause the underwriter frustration and concern. When the broker has absorbed all the information they will be able to advise you on the recommended mix of insurance cover for the event, communicate your requirements to suitable underwriters and provide you the details of costs and cover available. The quotations you receive should clearly state what is covered, the underwriter's charge, what the broker is earning out of the deal and the Insurance Premium Tax (IPT). Remember to ask your broker for advice on the stability of the various underwriters as well as the likelihood of any claims to be paid – there's little point paying a low premium if the insurer has a bad pay-out record. Your policy is likely to include a range of cover including:

- **Public Liability** – this covers you against claims made by the public who attend the event. Premiums are based on many factors including the size and profile of the event, type of audience, etc. Levels of cover vary depending on your needs so it is imperative that you discuss your requirements fully with a broker.

- **Employers Liability** – if you have one, your existing office policy may cover you and your staff when you are in the office, but it may not cover you when on site during the build up/take down or the live event. It is also unlikely to cover occasional staff, crew and volunteers who work at the event. You may therefore either need to extend the existing cover to include additional personnel and time or take out another policy specific to the event. The level of cover and premium often depends on the number of staff, the payroll and duties.
- **Event Equipment & Property Cover** – when you hire equipment for an event it is likely that insurance is not included in the hire charge (always check this with suppliers). Some companies offer this service based on a percentage of the hire charge, which you can opt to take. If this service is not offered or if you choose not to take the cover with them, it is imperative you insure any hired equipment from the moment you take delivery until it is collected after the event. Also, don't assume that any equipment you take from your office to the event site is covered by your office policy.
- **Cancellation & Abandonment Insurance** – just like it says, this covers you for cancellation or abandonment of the event due to situations beyond your control such as flooding, inclement weather, postponement, etc. Levels of cover will depend on your particular requirements and the level of risk. Check the policy carefully for exclusions. This insurance can be very costly but it's necessary for many events, particularly those with an entry ticket charge. If you decide not to take out this cover, make sure you have a contingency plan in place should your event be cancelled.

Claims Management

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

- Ensure that you keep an incident book and that all staff are aware how incidents should be reported and managed

- In the event of an incident, gather key information (hard evidence) such as photographs; witness statements and contacts; details describing any equipment involved and the activity being undertaken at the time of the incident; details of any damage to property or persons; documentation relating to the injured person such as registration forms; a statement of any medical treatment offered/accepted/ refused; contact details for the injured person, etc
- Notify your insurance broker as soon as possible after an incident if you think a claim might arise
- Copy any letters of claim to your broker immediately and allow them to deal with the claim

I. EVENT PRODUCTION

The nature and size of your event will have a direct bearing on the level of production equipment, facilities, services, staff and time required to make it happen. Make sure your assessment of what's required to facilitate the production process is accurate and build in contingencies where you can. Events with too short a production time can attract additional and unnecessary costs and the likelihood of making mistakes or missing out key steps in procedures that may affect health and safety will be greater. It is not possible to comprehensively list all the production equipment, services and facilities that you may require (each event is likely to have a long and very specific list pertinent to its particular circumstances). Instead, we have provided some examples to help you put your own checklist together.

Production Equipment – Sample Checklist

- Staging and associated structures – disabled platforms, sound delay towers, etc
- Lighting, audio and visual equipment
- Power – generators and distribution cables
- Electrical supplies
- Fuel
- Cable covers and ramps
- Plumbing supplies

- Joinery supplies
- Barriers, ropes & stakes, etc – front of stage, perimeter, no-go areas, queuing systems, etc
- Portacabins, tents, marquees, etc – dressing rooms, production and site offices, first aid points, catering, storage, baby change, etc
- Ballast – for staging, tents and other structures
- Temporary tracking & ground cover – trackway, blaze, hard core, sand, bark chips, etc
- Transport & vehicles – forklift, cherry picker, crane, off-road vehicles, flat bed trucks, vans, cars, etc
- Fire-fighting equipment – fire extinguishers, blankets, etc
- Sports specific equipment – timing equipment, photo finish, hurdles, batons, etc
- Refuse disposal – bins, skips, etc
- Other plant hire
- On site office equipment – computer, printer, admin supplies, etc
- Seating and furniture – audience, offices, catering, dressing rooms, etc
- Canopies and coverings – for equipment, audience, etc in the event of inclement weather
- Site decoration and dressing
- Health and safety signage
- Directional and information signage

Site / Venue Layout

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

1) Capacity

The capacity of your site/venue is calculated based on the available audience space, the number of emergency exits (see Access, Egress & Flow) and the risk assessment for the venue and the

event. Site Layout is therefore particularly important if you need to maximise the audience potential. Keep in mind:

- For outdoor events where a standing crowd gathers in a defined space to watch the entertainment (such as at a street theatre or a music event) the general acceptance for a clear, flat, open space with a reasonable view of the performance is 2 people per 1m². However the figure should not be applied to all of the available space.
- Not all of the available space for the audience will have a clear view of the entertainment. In such instances a lesser figure should be applied or the area should be taken out of the equation altogether.
- Existing site features such as hills, trees and site line obstructions will further reduce the capacity.
- Other areas that may be in and around the audience space such as front of house areas, media stands, camera positions, judges boxes, sound delay towers, water towers, disabled platforms, etc will further reduce the capacity.
- Types of entertainment such as funfairs will have different calculations based on the number and type of rides and the available space between the rides.
- Your venue may be seated, standing or a combination of both. The seating available may be actual seats or it could be areas where people can sit on the ground. If the venue is outdoors you may or may not have covered areas to sit or stand if the weather is inclement. Each of these points will influence the final capacity of the event. Remember to also take into account any potential 'pinch points' around the venue.
- If the site/venue area is extensive, consider the viability of placing screens around the site to show the main entertainment. These may be helpful with increasing capacity potential while reducing the possibility of overcrowding or surging.
- Remember to recalculate the capacity if the site layout changes or if structures are added, removed, etc.
- As you can see, the calculation and issue of capacity can be tricky and it may be helpful to involve an experienced risk assessor who will provide advice and a maximum capacity figure after consideration of all the facts.

2) Access, Egress & Flow

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

- The venue may have existing or natural points of access/egress. If you have chosen an existing indoor venue, then its access and egress points (which will have helped determine the capacity) are likely to be fixed. However, if you are utilising an openplan outdoor site you will have to determine where the best possible access and egress points should be for the audience, staff and equipment. The exit requirements depend on capacity and the acceptable time taken to exit the venue. Seek advice from the local authority and the Fire Brigade when calculating number and width of exits.
- Spectator flows at sports events, i.e. access and egress during sessions, should be considered.
- You must also check that any large equipment that is being brought to the event can fit through the access/egress and there is suitable turning space for large vehicles to enter and exit the venue.
- Do not mix pedestrian and vehicular access/egress if at all possible. Similarly, try to keep public, staff and performer/participant access/egress separate from each other.
- Ensure all access points have suitable gathering/queuing spaces for the audience expected and all egress points have safe exit potential
- Individual or specially created access for the disabled may be required.
- Consideration must also be given to the emergency services. It is likely you will require the presence of first aid facilities at the event but in the event of a more serious incident arising, e.g. someone requires hospital attention or a fire tender needs access, clear access into the site, passage around the site and egress from the site is necessary. If appropriate, representatives from the emergency services should be able to advise on this point and may recommend sterile access routes or pathways for their use.
- To avoid the audience making their own paths, create clearly defined routes around the site that are wide enough to accommodate the amount of footfall that is anticipated.
- Ensure there is enough space for people to gather or queue at concession or entertainment areas without impeding the paths or access/egress routes.
- Avoid building dead ends into the layout at all costs as these could be detrimental to health and safety.
- The siting of entertainment should encourage a steady movement of the audience around the event site/venue. In other words, if there is multiple entertainment on offer, it should not be concentrated in the one area. This will help minimise the risk of 'hot

spots' and bottlenecks building up. Avoid a haphazard or cluttered layout as this can impede flow.