chapter one

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

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

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

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

1) The Event Concept

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

- Celebrate a unique aspect associated with your town or area
- Showcase or develop a particular cultural or sporting activity
- Mark an historic occasion, national day or local holiday
- Host or create a competitive or mass participation sporting event
- Encourage more visitors to come and spend time (and money) in the town/area
- Improve or refocus the image of your town/area
- Encourage and celebrate community activity
- Mark an opening or launch
- Etc
Whatever the impetus for your event, you will have identified an opportunity and assessed the various broad risk factors associated with its successful delivery. You will have considered:

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

**Always Review and Revise**

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

**Why are you staging the event?**

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

**How will the event be developed?**

- Do you (still) have the right skills in place to develop and deliver the event?
- Can you build on previous successes?
- What areas could be developed further?
- How can interest be maintained?
- Is there potential to attract new audiences?
Is the marketing working?
How will you maintain or extend the financial viability of the event?
Do you need to consolidate the event or focus on key elements?
Do you need to widen the scope of the event?
Has the event reached capacity?
Has the event reached the end of its life cycle?

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

2) Communicating the Vision and the Mission

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

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

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

**Mission:**
To deliver a viable portfolio of events to attract visitors to Scotland, to enhance Scotland’s international profile, to strengthen our sporting and cultural infrastructure and to maximise the economic, social and environmental benefits of events to all parts of the country.
Here’s an example of what a vision and mission statement might look like for a visual arts festival in ‘X-Town’:

**Vision:**
To put X-Town’s visual arts heritage and community on the Scottish cultural map.

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

3) **Setting SMART Objectives**

You should also be able to define and communicate your event’s objectives. Your objectives should help deliver your vision and mission. Objectives need to be clearly set out and should follow the SMART principle: 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.
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- **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

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

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

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

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

Consider the following points:

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

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

### SWOT Template Guide

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<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
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<tr>
<td>Experienced event management team</td>
<td>Lack of marketing and media expertise</td>
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<td>Supportive and active network of local artists</td>
<td>Limited sponsorship success</td>
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<td>Good local authority support and active visual arts officer</td>
<td>Remote location</td>
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<td>Event vision is convergent with local visual arts and events strategies</td>
<td>Lack of quality accommodation for overnight visitors</td>
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<td>Growing audience base</td>
<td>Poor late night transport</td>
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<td>Etc…</td>
<td>Etc…</td>
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</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
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</thead>
<tbody>
<tr>
<td>Local tourism forum keen to work in closer partnership</td>
<td>Increasing costs/standstill funding</td>
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<tr>
<td>EventScotland’s Regional Events Programme</td>
<td>Event Manager moving on next year</td>
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<td>Local artist recently awarded major arts prize bringing increased media interest to the town</td>
<td>Competition from ‘Y-Town Arts Festival’</td>
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<td>New supermarket opening in town – sponsorship possibilities attached</td>
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5) **Other Initial Considerations:**

### Choosing the Date and Venue

#### Lead Time

Having sufficient time to plan, fundraise, market and implement the event ‘action plan’ is a critical issue. Never underestimate how long the process can actually take. Failure
to allow adequate lead time decreases the chances of success in all aspects of event planning and delivery.

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

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

The Date

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

- **Nature of the Event** – is it an outdoor event; does it need to be staged in a particular season; is its location intrinsic to its success (i.e. does it have to be in a particular venue, city/town, location, etc)?

- **Weather** – what are the probable weather conditions at your preferred time of year; will inclement weather affect the event; are there contingency opportunities available?
Target Audience – who are you hoping to attract to the event: is this more achievable if it is staged at a particular time of year, holiday time, at the weekend, mid-week, etc?

Clash Diaries – what else is happening at the chosen location/venue; is the event diary overly busy? It’s worth talking to your local authority, VisitScotland network office and other appropriate organisations to check what else is planned for your area at the time. You should also check to see if your event clashes with any similar events further afield that may also attract your target audience or participants. A good place to start are the events diaries on www.visitscotland.com, www.eventscotland.org, www.sportscotland.org.uk, www.scottisharts.org.uk and your local authority website. Also think about the potential of your event competing with other wider issues and stories for media interest.

Complementary Activity – are there any complementary events or activities taking place at the same time that could assist your event? Could you work together for mutual benefits?

Competition – are there other similar themed or scaled events taking place that are targeted at the same audience? Is there room for your event in the marketplace at your chosen time of year?

Resources – are other major events (football, concerts, conferences, etc) taking place at the same time that will impact on the resources required to stage your event (i.e. the availability of accommodation, staff and volunteers, hired equipment and facilities, venues, support from emergency services, local authority, etc)?

Other Factors – don’t forget to check out any other influencing or relevant issues e.g. road or building works planned in the vicinity at the same time as your event.

Shoulder Periods

It is also important to consider the value of placing your event in ‘shoulder periods’ (i.e. times of the year outwith the main tourism season). Placing events at these off-peak times may address issues regarding the lack of resources and conflicting events, as well as introducing additional economic benefits to communities by attracting new activity and visitors in an otherwise quiet time. Events taking place in these periods
may well be prioritised for support from public bodies; however you must be confident that you can attract the necessary level of audiences/spectators/participants when considering this option.

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

The Venue

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

- **Event History** – where has the event been held in the past; what were the pros and cons of holding it there (remember – never underestimate the impact of an existing event venue: its location and how it is perceived may well be a powerful tool in drawing audiences/spectators/participants); are there any benefits in changing venue; are there other elements being added to the event that require additional facilities or space?

- **Venue History & Reputation** – what venue(s) fit with the qualities and principles of the event; are certain venues synonymous with your individual event type; will a particular venue give added kudos or be detrimental to the event?

- **Location** – does the event need to be located in the centre of town; does the location have potential to expand with the event; are there necessary facilities nearby such as transport links, accommodation, etc?

- **Budget** – will the budget support the choice of venue; have all the possible costs been considered?
Conditions of Contract – are you required to use the venue’s own technical staff; does the venue insist on supplying catering and bar facilities; what type and level of insurance is required on your part and what is covered by the venue; what are the terms of payment; will any of these requirements have an impact on the financial viability of your event?

Audience – what capacity is required (this time and in the future as the event grows); is it accessible for people with disabilities or special needs; will your target audience identify with the venue?

Services & Resources – what support can the venue offer (staffing, security, administration, production, bar facilities, toilet facilities, etc)?

Transport & Parking – can staff and audience park at or near to the venue; are there good public transport links; can production and other services/deliveries unload and park as necessary at the venue; are VIP and disabled spaces available?

Timing – can the venue accommodate the entire event requirements: event build, live event and take-down; is there a potential clash with other events or activity happening at the same time, before or after your event?

Permissions – what permissions are required (landowner, licences, sanctioning, road closures, etc)?

Infrastructure and Layout – what space is required for all aspects of the event (production compound, event parking, audience, staging, signage & branding, artists/competitors, press, exclusion zone, etc); what level of infrastructure do you require and what kind of work (if necessary) are you prepared to undertake to get the venue to a useable state?

Restrictions – what are the venue opening and closing times (during the event build, live event, and take-down), do you have 24hr access; is there a corkage charge, administration charge, etc; can you display your sponsors’ signage or will it clash with existing venue sponsors or suppliers?
Reinstatement – who is responsible for clean-up, rubbish removal, reinstating street furniture, ground works, etc; what are the estimated costs; is a bond required to be paid in advance to cover the cost of damages to the venue or land?

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

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

The Event Action Plan

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

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

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

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

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

The complexity of your event will determine the complexity of your Event Action Plan. You may have project management software to help you put together your plan, but if not, a simple activity/month table is useful.
Below is a basic template that you could easily replicate in Microsoft Word or similar packages. We have included some sample entries to get you started. As appropriate, you can expand your Action Plan by providing the necessary detail. The point is that it has got to work for you and your event.

**EVENT ACTION PLAN TEMPLATE**

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

**TOP TIPS**

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