

REVISED AND UPDATED
3rd
EDITION

The Event Manager's Bible

The Complete Guide to
Planning and Organising a
Voluntary or Public Event



D G Conway

The Event Manager's Bible

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The Complete Guide to
Planning and Organising a
Voluntary or Public Event

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3rd
THIRD EDITION

D G Conway

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1

Introduction

What is an event?

This book will help you to research, plan, organise, manage and deliver any event, match, show, tournament or function that will be attended by more than a handful of people. You may call your event a gymkhana, fun run, steam fayre, half marathon, carnival, school sports day, jumble sale, tennis tournament, car boot sale, or model aircraft show. The names change, but there are common requirements and considerations to them all. For the purpose of this book, we will describe your target function simply as the 'event'.

What will this book give me?

Many events have not been as successful as they could have been, because the organiser failed to adequately plan, and overlooked or under-estimated important things. Apparently insignificant mistakes can ruin a potentially successful event.

Events can be of any size, from huge pop festivals or Formula 1 car races attracting many thousands of spectators, down to primary school sports days attracting only a handful of people. No matter what their name or size, they all have an event manager, an objective, an audience and attractions. To deliver any of them, somebody had to investigate, research, plan, liaise with the authorities, obtain permissions and licences and then deliver the event to the public.

Anyone organising a large pop concert or other major event will almost certainly have professional assistance and previous plans on which to base their arrangements. This guide is therefore aimed at aspiring event managers, or the inexperienced who want to organise a smaller event attracting a few hundred, or a few thousand spectators.

More experienced event managers will read this book as a refresher, or possibly just to get a different view of some aspects of event management.

The objective is to offer four things:

- *guidance* – as to what to consider when researching, planning and running an event,
- *structure and method* – to use to plan and organise your event,
- *lists* – to help you to make your plans, and
- *outside agencies* – an indication of the agencies that you may have to contact to arrange a successful event.

Who wrote this book?

I have been involved in the organisation, planning and management of events and shows for about 20 years. For 15 of those years I have had a growing part in the police coverage of small, medium and large events.

During that time I made mistakes and have learned from the mistakes others have made. In event management, there is always something new. That is partly due to the introduction of new regulations or legislation and mostly due to the imagination and inventiveness of the population at large. As an illustration of that point, 20 years ago nobody had heard of bungee jumping out of a basket suspended from a mobile crane, so that was not a potential attraction that an event manager had to consider!

I am still learning. I welcome any input on problems that I have not experienced or covered in this guide.

I realised that at event after event I kept seeing the same mistakes being made and was constantly being asked the same questions. I began to give advice and hoped that my assistance would help others avoid known problems but there was a limit to the number of people I could speak to. To reach a wider audience I decided to produce a ‘small pamphlet’ summarising my method and advice. Over time, the original pamphlet expanded into this book.

Though your event theme, content, size, venue, target audience and objectives may vary, the methodology I propose remains basically the same. Using the sections of this guide will help you to consider logically the common aspects of event management, with the aim of validating and planning your proposed event so that it is ultimately successful.

What do you need?

To plan, organise and run an event, you will need time to investigate, research and plan; you will need methods to help you with that investigation and research, and you

will need to possess or ‘buy in’ a variety of skills. Those skills include such diverse trades and professions as project management, sign writing, accounting and personnel management.

This book is primarily aimed at helping you to organise an event; I do not cover any of the specialist skills in any depth. For example, I simply touch on administrative and organisational aspects of event accounting that will contribute to the success of your event. If you need expert advice regarding event accounts, you should buy an accountancy book or, better still, consult an accountant or other relevant expert.

How long will it take?

The amount of time it will take depends on your event type, theme, objective, location, size and attractions, your skills and experience, the amount of time you have available and maybe a hundred other factors.

As an indication, I would suggest that organising and delivering the smallest event will probably take at least four months from first concept to when the gates are open to the public. On your first attempt to organise and deliver an event for an audience of more than 1000 people I would allow a *minimum* of 12 to 18 months. This includes time for your research and investigation, for staff recruitment and training and for waiting to receive written estimates and quotes from commercial suppliers. You must also remember that you will be dependent on the timetables of other organisations. For example, because many authorities have scheduled monthly or even quarterly committee meetings, you may find that you have to wait several months for their next scheduled meeting to approve or reject your proposals.

Different event – different emphasis

Working through this book, you will investigate and eventually arrange all of the requirements for your event, but *every event is unique*, so this book can only be a guide. The emphasis of different aspects of the investigation and arrangements will be different for everyone and I will remind you of that fact at appropriate places in this book.

To illustrate that point, you will accept that there is nothing complex about ‘first aid’ as a subject, but the effort needed to organise first aid cover for a primary school fête will be insignificant compared to the effort required to organise first aid cover for a Formula 1 car race. This shows that though both events require and organise ‘first aid cover’, at the primary school it will probably be a teacher with first aid skills and a small first aid box, for the Formula 1 race it involves several doctors, ambulances,

hospitals on standby, paramedics and a helicopter for medical evacuation. Though all event managers will be looking at the same subjects, the content and delivery of their event will heavily influence how they organise, plan and manage those arrangements.

While working through this book, you must therefore be prepared to tailor the approach, amend the lists and vary the depth and scope of your investigation, to match your unique requirements. You will be helped in that as you work through by talking to and taking advice from local authorities, the emergency services and any other relevant groups or governing bodies. In some areas, these authorities have come together to form Safety Advisory Groups.

If you don't know how to approach the organisation and delivery of an event I suggest that you work through the chapters (stages) in this guide in numerical sequence. When you understand the concepts and issues involved, you might want to amend the sequence of your work to suit your event.

Your unique event might even lead you to change the order of some elements of your investigation and preparation. For example, there are two approaches to organising attractions – it depends on your starting point.

If, when you start, you have a specific attraction available, perhaps a steam engine, as the basis for your event, you will have to work towards attracting an audience that likes steam engines. Alternately, if your starting point is that you have an audience (members of your club), you could take the reverse approach and want to find and book attractions that your audience want to see and will find interesting. This illustrates the fact that you may wish to take a different path through your preparations. For example, in this case you may choose to change the order of your work in the areas of Chapter 8 'Defining your target audience' and Chapter 11 'Event attractions' – depending on your starting point. You can change the order to suit your needs, as long as you perform all of the stages.

You should also remember that some outside agencies might have jurisdiction over your event. For example, at higher levels of some sports the governing body may impose various rules and limitations. Government agencies may have some jurisdiction as well. For example, the Environment Agency may impose rules and restrictions on a fishing contest!

How to use this book

I strongly suggest that you read this book twice.

The first reading

During the first read-through, you will get an overview of the method and understand why you need to invest your effort in detailed investigation and planning.

As you work through this book, you will get a feel for the skills and expertise that will be needed at various stages and you will be able to identify areas where you need to get outside help, for example from an accountant.

The first pass will also give you early warning of decisions you will have to make and options you will need to take. You may even start preparing for those decisions. For example, you could ask your club committee to clarify why you are running the event, or perhaps start asking tent hire companies and other suppliers for price lists and brochures!

You will also begin to decide how to modify the depth and scope of your investigations to suit your unique event and circumstances. Where you do think you have a unique requirement, make a note in the margin or against the lists at the appropriate place in this book (see 'Is this your book' below), to remind you as you work through to deliver your event. For example, if your event includes animals, you may need to arrange for the presence of a veterinary surgeon and they will need an office or base of operations.

Finally, you will have a feel for the staff and resources you require and so will have extra time to start locating and arranging them.

The second reading

At this stage, you should begin working through the book, investigating, researching, documenting and making decisions as you work towards actually delivering your event.

'Dipper' warning

You may be tempted to simply dip in and scan a few selected chapters in this book, hoping to reinforce your existing knowledge, or checking elements of your planned arrangements where you are unsure or inexperienced. Alternately you may just want to check a few lists, for example in an attempt to satisfy yourself that you have prepared all the signs that you will need on your site.

I strongly advise you to *read the whole book* to fully understand the issues, concepts and potential problems before you look at illustrative lists. Reading small sections, or just reading a couple of chapters will not give you the 'big picture' and full understanding that you need.

More experienced event managers should also consider the changes that have taken place over the past few years. Not too many years ago, event planning and management had two basic functions: first, renting a big enough field; and second, collecting the money. That has changed in the last few years and the emphasis is now on health and safety, management and control, licences, authorisation and permissions.

If nothing else, this book will refresh your memory and I am certain that you will find nuggets of new information that you will adopt to improve your event and method of event planning and delivery.

In understanding the scope and depth of problems, you may discover a potentially fatal or costly flaw in your proposed approach to planning and running your event.

Though every effort has been made to ensure that the contents of this guide are accurate at the time of printing, events vary dramatically and rules and requirements change over time depending on the event content and format. It is important that you remember that *you* are the event manager for your event; *you* are responsible for everything. That includes checking current and local rules, national legislation and the current rules of other governing bodies to ensure that everything is right for *your event*.

Format of the guide

The format of this guide is simple and easy to follow. The process of defining, researching, planning and running an event is broken down into simple stages and each stage is described in a separate chapter. I have already stated that as your event is unique, you are free to change the order in which you complete the stages, as long as you do complete all of the stages. Beware of switching stages too much. As the output from one stage usually feeds in to the following stage, the sequence used in this book is carefully planned. If you wildly change the order of stages you risk losing the benefit of the method. You should also note that the illustrative lists are for guidance only, you may have to add non-standard roles, signs and facilities.

Where I consider a point of information to be worthy of a special mention, it is displayed as a boxed 'Tip', at an appropriate point in the text of the relevant chapter.

At the end of each chapter, I have listed the progress you should have made (during your second reading of the book). There is also a list of the 'products' that you should have completed and delivered after working through each chapter. You should remember that if you have created additional 'products' for your specific event, you should write them in at an appropriate place to remind you.

Writing style

I was once told ‘never use three words when one will do’, which is correct when you are dealing with a reading audience who knows the subject and has a common level of skill, understanding and experience. This book has been written to help ‘any’ reader understand the underlying concepts and procedures in event management. I have therefore included more explanation for two reasons.

I have tried to make each chapter free standing, so you will not constantly be referred to other pages, chapters or an annex. As some event management tasks and functions are linked, I have attempted to include all relevant details and explanations in a given chapter. This occasionally means that explanations are appropriately duplicated elsewhere in the book though different examples are used. Though you need to have read through the whole book to understand the approach, this inclusive style helps in your second working-through of the book, when everything you need to know about a stage should be contained within that chapter.

I have explained the reasoning behind my advice by including anecdotes and examples to help you to see and understand the underlying concepts and processes. With that ‘deeper’ understanding, you will know how and why decisions are made and be able to apply the concepts to your unique event, rather than having to blindly following a crude list that tells you to do some things and not to do others.

Is this your book?

Some books are expected to be read and then put down. If you follow my methodology, you will start to personalise the contents of this book. This book is a ‘workbook’ and as such it is an integral part of your event planning and delivery.

As stated above, my event planning and delivery method requires you to read this book twice. As you read through with your unique event in mind, you will identify areas in which you have unusual, specialist or non-standard requirements. As you identify them you should write them in at appropriate places in the book. You will probably amend lists, add comments and reminders, or write in the name and number of important contacts. For example, against the list of possible standard jobs and responsibilities in Chapter 20, you may know that for your event you need a hot air balloon pilot and an expert bee keeper. If so add them to the jobs and responsibilities list. You may also want to highlight sections that you think will be difficult or may give you problems in delivering your event. If you think it is worth writing it in, *do it!* All of these things will help you to deliver a successful event and this interaction with the book will turn it into a ‘workbook’.

Writing these reminders at appropriate places in the book delivers two significant benefits:

- Important things will not be forgotten or overlooked later.
- The reminders are written into the sections of the book where they will be included in your planning and delivery.

But if this is a library book – please don't write in it! By all means take it out of the library and read through to see if you think that its methodology and approach will work for you. However, if you want to use the book and methodology as intended, you must buy your own copy of the book so that you are free to write in it as you see fit. Please remember, though my methodology advises you to write in this book, *only do so if you own the book.*

Overview of process

The approach and methodology I propose in this book are not new or ground breaking, they are simply the collected wisdom, trial and error and experience gathered over many years from a host of event organisers.

I propose that where possible you should work through the contents of the book in order (or in the order that matches your needs). Each chapter contains a 'stage' of the process, though there is a degree of overlap in some areas and checkpoint reviews may demand that you go back a stage or two to change or confirm some details. I know that life is rarely neat and convenient, but generally one stage should be completed before you start the next stage. I accept that, depending on circumstances, you may have to vary that approach. You will probably find that while working on Chapter 6, you may still be tying up loose ends and documenting elements of Chapter 5, and you or a deputy may just be starting to make calls and send emails in preparation for Chapter 7. Although that is acceptable, be warned that if you try to run some critical stages in parallel, you stand a huge risk of falling into an endless circle of review and reworking. It is possible that your findings and decisions for some stages could impact decisions and arrangements in other stages, causing yet another endless loop of review and reworking.

As you progress, you will gradually collect more information, refining your plans and arrangements. You will gain confidence in the viability of your proposed event, or it is *possible* that you could realise that there is a fatal flaw and that your proposed event will be too costly or too dangerous to run, so you may abandon the idea!

Generally, when finished, the output and results from each stage should be reviewed to reconfirm the viability of your proposals and then fed on into the following stages.

This logical progression with *checkpoints* at the end of some stages formalises your reviews and forces you to reconsider the event's viability in the light of the latest research and investigation. For example, if you discover that there is no suitable site available, you may feel it best to abandon the proposed event at that point, with least effort and resources expended. Alternately you may wish to check which aspect of the proposed event you would need to change so that you could fit it onto the available site! Whichever option you choose, you can be assured that if your research is valid, you are making decisions based on fact and not guessing or simply taking a chance.

Tip

As you work through this book, keep copies of all of your research, options, problems and decisions – it may come in handy later. If you encounter a problem with your plans, you may want to backtrack to an earlier stage; to revisit earlier research and decisions in an attempt to take a new direction bypassing the problem you encountered.

Progress and stepping back

Generally, you should work through one chapter at a time, but there will be times when you have to step back to amend and review elements of your investigations and plans. Though that is acceptable and expected, you should try to do so in a logical way.

For example, if while working through 'Staffing' (Chapter 20), you find that you have to revisit 'Permissions' (Chapter 17), you should take the following action:

- Slow or suspend work on staffing (Chapter 20).
- Return to Chapter 17 to resolve the problem relating to permissions.
- Realise that your new revision of investigations and decisions in Chapter 17 may have an impact on subsequent preparations.
- To check that there has been no impact on subsequent research and decisions, review, amend and reconfirm investigations and decisions made in the intervening chapters: permissions (Chapter 17), car parking (Chapter 18), radio communications (Chapter 19).
- Review, amend and reconfirm work done so far in investigations and decisions about staffing (Chapter 20) then carry on as normal.

Project management – a simple approach

In the past, event organisers have complained to me that they have become confused with, or lost track of, the dozens if not hundreds of different tasks that they have to complete to deliver their event. I have suggested that they treat the planning, organisation and management of the event as a ‘project’ and that they should adopt a ‘project management approach’ to planning and delivering their event.

Saying that has scared some people and worried most, because ‘project management’ is viewed as something mysterious, very technical and complicated. It can be, but fundamentally, project management is simply a formalised and structured approach to planning and managing a group of tasks, to a given timetable, with a specified objective, within given quality standards.

At Annex A ‘*Project Management Supplement: Managing The Event*’, I have described my simple approach to managing a project, using a simplified project management methodology.

Progress – Chapter 1

You should now:

- know that you are taking on a complex task,
- know how to use this book,
- understand the overall method.

2

The event manager

This is the start of the process of investigation; research and decision making that will ultimately lead to the development of detailed plans for the successful delivery of your event. (Remember on your first reading you are only being asked to recognise the method and stages and to start thinking about the decisions you will be asked to make during the second, ‘workbook’ phase.)

What is an event manager?

For anything and everything, there has to be one person with supreme authority. For our purposes we will assume that the person in charge of a proposed event is called the ‘event manager’. Their primary duty is to make or confirm all decisions and act as central liaison, directing and controlling the activities of individuals to whom they have delegated responsibility for elements of the organisation and arrangements for an event.

Delegation – benefits and risk

Except for the smallest of events, the event manager cannot possibly do everything, so they must learn to delegate. Delegating organisational responsibility for various elements of the event to deputies or assistants spreads the workload and takes advantage of specialist expertise that the deputies may have. It is, however, very important that the event manager retains control, in order to deliver the event on time and within budget.

Though delegation is one of the most important tools available to the event manager, it must be used with caution. There is a level of delegation beyond which