

EVENT MANAGEMENT PLAN CHECKLIST AND GUIDE

This guide was compiled by Downtown South Bend, Inc. as a toolkit for assisting community groups and organizations in creating and managing events and festivals. Please remember it is only a guide and information should be checked with appropriate authorities as part of any event preparation.

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INTRODUCTION

This toolkit is produced by Downtown South Bend, Inc. (DTSB) for people interested in organizing an event or festival in Downtown South Bend. DTSB understands the importance of events as they showcase the unique culture our downtown offers while promoting a positive image to our visitors. Events also contribute to the economic well being of downtown by attracting patrons to local businesses.

Included in this toolkit are practical guides and resources to help plan, promote and stage a successful festival or event. Along with providing guidance on how to go about each stage of the process, there are templates and information that can be adapted to suit your unique event.

EVENT PLAN

Planning is the most important part of running a successful event, and this means starting well in advance. The best way to approach planning is to develop a detailed management plan including a time table for what needs to be accomplished and when. Crucial elements of planning such as fundraising, booking entertainment, marketing and many others need to happen well in advance of the date of your event.

Developing an Event Plan is critical in ensuring the success of your event. The information provided in this guide is designed to walk you through each step involved in organizing your festival or event and can be used as a checklist. As DTSB has produced many and varied successful events in the past, this guide attempts to be as comprehensive as possible. Please be mindful, though, that this is only a guide and as events vary in size, scope and purpose, you may have additional requirements or need additional information not contained here.

1. EVENT DETAILS

1.1 **Event Place and Time**

In this section you should provide a general overview of your event and be as specific as possible about the activities you are proposing to conduct at the event.

When selecting a date, it is a good idea to coordinate around other local and regional events so as not to segment your potential patrons. Time of year is also a factor, so also consider holidays and school breaks when families typically leave town. In short, schedule your event during a time when you are likely to attract the most visitors.

When preparing event schedule, be sure to provide details concerning set up and break down as well as actual times associated with the activities taking place during the event in order to give all those involved and affected by the event as accurate a picture as possible as to how all of the elements will play out. If your event or festival has any impact on a neighborhood or business district, negative feelings can be easily avoided by thorough, upfront communication.

1.2 **Event Contact**

The Event Chair or Director is responsible for the overall management of the event. Their role includes organizing, resourcing, creative directing, human resource management, negotiating, financial management, public relations and troubleshooting. The Event Chair must be available to all committee chairs through all stages of the event from planning to break down and settling all financial obligations.

2. ORGANIZING COMMITTEE

Putting the right group together to work to bring your event idea to reality is essential. Targeting a person or persons who have been involved with other successful events is always helpful. It is often easy to find people willing to help when they share a passion for the particular theme or purpose of the event, but it is important to target volunteers who have the right knowledge base for a particular task or to chair a particular committee.

When money is involved, a treasurer with experience managing a balance sheet is very important and a determined hierarchy making decisions pertaining to expenditures is also necessary to avoid conflict. Passionate people who may not have an applicable area of expertise for a committee chair position are still most valuable to help fill out committees and provide support, energy, positive attitudes, grass roots marketing and fun...all necessary for any successful event.

2.1 **Roles and Responsibilities**

However the team is set up, specific roles should be allocated so expectations are clear. Essential roles include:

- Event Chair
- Treasurer
- Marketing and Communications
- Fundraising
- Entertainment
- Food/Beverage
- Facilities e.g. Staging/Set Up/Break Down

The Event Chair oversees all aspects of the event and often takes a major role in fundraising along with the Fundraising Chair. The Event Chair is responsible for:

- The overall vision of the event and its purpose

- Coordination from planning to completion
- Setting the positive tone for all volunteers
- Ensuring that the event complies with all laws, policies and regulations
- Ensuring all required paperwork is completed in a timely fashion and necessary permissions are obtained
- Maintaining accurate records
- Budget forecasting and financial control
- With the Fundraising Committee, creating Sponsorship Levels and Benefits packages
- With the Marketing Committee, creating a targeted Marketing approach and budget

3. FINANCIAL PLANNING

You may have a great idea for an event but it can't happen if it's not financially viable.

3.1 **Budget**

In order to approach potential funders, it is necessary to have first created a realistic, projected income and expense report.

Income sources fall into two main categories:

- a) Earned income: Ticket sales, Merchandise/Food/Beverage sales, etc.
- b) Unearned income: Grants, Donations - from individuals and businesses

Expenses include everything that money is spent on that pertains directly to the event. Examples are: administration costs, site rental, staging, performer's fees, food and beverage costs, travel and all costs associated with Marketing from designing and printing posters and brochures to developing commercials and buying ad time.

When developing a budget, it is vital to be realistic, to research and to get quotes for all of the costs expected to be incurred. Just as important is a realistic approach to determining what income can be anticipated from all funding sources. Try to get a look at the budgets of other events in the area that have a similar size and scope.

3.2 **Financial Support**

Most commonly, earned income isn't enough to cover all the costs associated with a festival or event. Grants, Sponsorships and Donations are almost always necessary.

Funding sources include:

- State and local government

- Trusts/Foundation
- Businesses
- Individuals

It is imperative to begin seeking funding as soon as possible, to ensure the viability of the event and to give grant organizations and foundations plenty of lead time to make a decision.

Keeping documentation and an accurate accounting of all income and expenses is necessary and grant organizations in particular will want a full accounting of how their money was spent once the event has taken place.

4. INSURANCE

Managing a public event includes ensuring for the safety of all involved from volunteers and vendors to patrons and the general public. It is highly recommended and may be mandatory that comprehensive liability insurance be in place and that legal advice be sought. Insurance should also cover property and equipment.

5. THE VENUE

The aim of this section is to help formulate a comprehensive map or site plan. In doing so, consideration should be given to potential hazards, access to egress and emergency services, pedestrian and handicap right of way, traffic flow and shelter.

5.1 **Potential Hazards**

When selecting a site, especially for an outdoor event, create a “Risk Assessment” to document any potential hazards in the area. Examples of things to consider:

- Terrain that may cause slips, trips or falls
- Proximity to bodies of water
- Wildlife
- Potential for fire
- Extreme temperatures
- Stability of buildings and structures
- Proximity to chemicals

Each site may pose a different safety consideration so the above list is by no means exhaustive. Once a site is chosen, list all potential hazards and the steps taken to mitigate them.

5.2 **Site Plan**

A site plan is a map of the event and is essential for planning and management. A comprehensive site plan should also be used in communication with all stakeholders so the scope of the event is well understood by all interested parties. It is also invaluable in an emergency.

A checklist will help determine what should be included on the site map. The map can be a simple grid including surrounding streets and landmarks, event coordination center, entrances and exits, information center, first aid areas, vendor locations, toilets, stages, security and any other pertinent locations.

5.3 **Site Plan Checklist**

The Checklist will give organizers a template for what needs to appear on the Site Plan. The list should be as comprehensive as possible and should be a working document as new and unforeseen needs and requirements can come up during the planning process.

5.4 **Contingency Plan**

Contingency Plans are important in an effort to minimize the negative effects of situations beyond the control of the planning process, such as weather. Once possibilities have been identified, the contingency plan should be formulated to include specific actions to be implemented in order to reduce the need for decision making during the event and to limit the negative impact should challenges arise.

6. TRAFFIC AND PEDESTRIAN MANAGEMENT

6.1 **Traffic Management Plan**

Patron access must be planned to limit disruption to neighboring businesses and homes and to ensure clear access by emergency services and event staff and vendors.

Arrangements must be made for the following:

- Adequate parking, including overflow
- Handicapped access and parking
- Preferred access routes
- Adequate lighting
- Shuttle services if necessary

6.2 **Road Closures**

If road closures are necessary, the development of a traffic management plan is recommended. Application for approval from the City of South Bend and its Board of Public Works is required. Beginning the process at least three months prior to the event is necessary to receive all approvals by the scheduled date.

Communicating street closures and any other potential disruptions to the neighboring community well in advance of the event is essential in maintaining positive feelings about the event and may be a requirement for approval. Costs associated with communication, preparing a traffic management plan, staffing closures, etc., are the responsibility of the event organizers so make sure this is considered when preparing a budget.

7. INCIDENT MANAGEMENT PLAN

7.1 **Event/Incident Management Center**

Event organizers, staff and volunteers should have one point of contact. Whether it is the Event Chair who is reachable via cell phone or walkie-talkie or a specific location at the event that serves as the communications center, there needs to be a way to quickly react to unforeseen circumstances and disseminate essential information to all involved with the event, to emergency personnel and to the public at large.

7.2 **Incident/First Aid/Emergency Management Plan**

The event must have a formal, written Incident Management Plan that is communicated and understood by everyone involved in the event. Involving police and fire personnel to aid with the development of the plan is highly recommended as they will likely have to approve it once completed.

The plan should include:

- Communication list designating responsible people and their contact information
- Detailed First Aid arrangements for non-emergency medical issues
- Contact numbers for Police, Fire and Medical Emergencies
- Emergency access routes
- Locations of portable fire protection equipment
- Arrangements for lost children and lost property
- Incident Report forms

8. PUBLIC HEALTH

8.1 **Temporary Food Vendors**

The provision of a variety of high quality, affordable food at public events contributes to the comfort and enjoyment of patrons, limits the effects of alcohol consumption and can increase revenue. It is recommended to sell food and alcohol in the same vicinity.

Adding food and alcohol to an event will require specific approvals from various entities, so it is important to communicate early the details of what and how food and beverages will be served, in order to have adequate time to get the proper approvals. Food and beverage vendors that would like to be involved in the event will also have to get their own approvals to participate, so a system of tracking, collecting and filing vendor licenses and approval notices is needed.

8.2 Alcohol

If liquor will be a part of the event, it must be served by a licensed alcoholic beverage caterer. If only beer and/or wine will be served, it is possible to get a temporary permit from the State’s Alcohol & Tobacco Commission for on premises consumption only after South Bend’s Chief of Police has approved of the request. "Carry out" and "carry on" is not permitted. The fee is Fifty Dollars (\$50) per day and must be paid by business check, money order, certified check or cashier’s check.

If the event caters to all ages, an adequately segregated area for the sale of alcoholic beverages is required and needs to be clearly marked on the site plan.

8.3 Toilets

The number of available toilets needed should be based on the following factors:

- Anticipated number of patrons
- Will food/alcohol be served
- Time of year (winter/summer)
- Duration of the event
- Are there permanent facilities available

The following table can be used as a guide.

Expected Attendance Standard Event								
	50	100	250	500	1000	5000	7000	10000
Hours								
2	1	2	3	4	5	23	32	46
4	1	2	3	4	7	32	45	64
6	2	3	4	6	8	36	51	72
8	2	3	4	8	8	39	54	77
10	2	3	4	8	9	40	57	81
With Alcohol								
2	2	3	4	5	6	26	36	52
4	2	3	4	5	8	36	51	72
6	3	4	5	7	9	41	58	81
8	3	4	5	9	9	44	61	87
10	3	4	5	9	10	45	64	92

The Americans With Disabilities Act requires that 5% of all facilities be wheelchair accessible.

8.4 **Shelter**

Shelter and/or shaded areas should be available wherever event organizers, volunteers and patrons may be located for extended periods of time and when weather conditions dictate. See the Event Site Plan to determine where shelter is necessary.

8.5 **Waste Management**

Supplying an adequate number of trash receptacles is important to provide a clean and inviting environment. The City of South Bend does not provide for recycling pickup so if recycling is to be an element of the event, it is necessary for event organizers to address that separately from trash management. It is recommended that containers totaling 192 gallons or 3, 64 gallon waste receptacles per 1000 people be placed strategically around the event grounds with a heavier density in the area of food and beverage vendors.

8.6 **Noise**

Events will often create noise levels higher than what is normal for a given area. Event organizers should keep in mind the potential for disturbing residents or businesses in proximity of the event. South Bend Police will not seek out potential violations of the local noise ordinance but they will respond to complaints.

9. PUBLIC SAFETY

9.1 **Security and Crowd Control**

Choosing appropriate security should be a top priority for any event. The safety of all involved is most essential. It is up to the organizing committee to start with a series of 'what if' questions and consider all potential safety issues. With those in mind the committee can determine whether police, private uniformed security, peer security or some combination is most appropriate.

9.2 **Place of Public Assembly**

For outdoor events held in fenced or enclosed areas, adequate entry and exit points must be provided. Exits and paths of travel to exits must be kept clear of obstructions. Specific requirements may vary according to the nature and size of the event. Entry, exit and assembly points should be clearly marked on the site plan.

9.3 **Lighting and Power**

In venues darkened for a performance, exit points and the paths leading to them must be illuminated and easily distinguishable. Generators may be necessary to provide lights and power to a public address system in case of a power outage.

As many performances take place with just stage lighting, access to general lighting or 'house lights' is necessary in case of an emergency. If there isn't professional staff running lights, organizing committee members should be made aware of the location of lighting controls and how to operate them. Even in the case of on-site professional staff, the Event Chair and the Facilities Chair should have a good understanding of any emergency plans.

For outdoor events, any temporary electrical installations need to be completed and certified by a licensed electrical contractor. And it is recommended that an electrician be available for the event.

9.4 **Temporary Structures**

Temporary Structures include:

- Stage or Platform
- Tent, Marquee, Booth
- Seating Stands
- Prefabricated Buildings

In 2012, the State of Indiana set new requirements for the use of temporary staging. The rules require many events to have engineer-approved plans for their rigging systems along with emergency plans. Smaller fairs and festivals would be exempt from most of the regulations if they create a buffer zone around their stages that extend 8 feet beyond the height of the rigging to protect fans in case of a collapse. Event organizers should consult with the City of South Bend Board of Public Works when temporary structures are required. Approval is also required from the Indiana Department of Homeland Security. See the Sample Forms section at the end of this guide to read detailed instructions on how to comply with Indiana's Building and Fire Safety Laws regarding Temporary Stages and Outdoor Stage Equipment.

9.5 **Fireworks and Pyrotechnics**

The rules governing the use of pyrotechnics are very specific. Any contractor that intends to use pyrotechnics must hold a valid federal license issued by the U.S. Department of the Treasury - Bureau of Alcohol, Tobacco and Firearms, for the use of "low explosives." A copy of this license shall be provided to the South Bend Fire Marshal at least one month prior to the event date. A complete description of the pyrotechnic activity shall be prepared and submitted 30 days in advance of the event and include the following information:

- Permit from the South Bend Fire Department.

- Plots showing exact location, type, and number of devices.
- Protective materials and equipment for activity.
- Location and number of fire extinguishers for activity.
- Schedule of activities, number of certified pyrotechnic operators, and their locations.
- Schedule for pre-show pyrotechnic test to be conducted in the presence of a South Bend Fire Inspector.

In addition to the above requirements the contractor must be licensed by the State of Indiana and approval must be granted by the Indiana Department of Homeland Security Division of Fire & Building Safety Fire & Building Code Enforcement. See Sample Forms at the end of this guide for the Application for Permit.

For public safety, fog/smoke machine usage is restricted to water-based chemicals. Approval must be obtained from the South Bend Fire Marshal.

10. EVENT PROMOTION AND MARKETING

Event promotion and marketing is one of the most important aspects of planning and executing an event. Naming a Marketing Chair that has professional experience is highly encouraged.

Setting a realistic marketing budget is extremely important to enable a marketing plan that will reach the most people in the appropriate demographic. Common forms of advertising include newspaper, posters, flyers, direct mail, radio, television, social media and email. Cross promotion utilizing a mix of media works most effectively. Creating a promotions schedule to manage dates, types of media and costs is helpful in carrying out the marketing plan and staying within budget.

10.1 Ticketing

Ticketing is important in maintaining crowd control and managing finances. If it is a ticketed event, the determination must be made as to selling tickets in advance or only at the door. Selling tickets in advance affords the opportunity to raise funds prior to the event, provide patrons with event details and to capture contact information for future marketing.

10.2 Signage

Clear, attractive and appropriate signage is not only essential in conveying important information to patrons but can help create brand awareness and a sense of place, setting the event apart from others. Coordination with city government will be necessary for requirements regarding the usage and placement of signage.

Recommended signs include:

- Entrances and Exits – even for non-ticketed events, an attractive entrance area can lend to a sense of excitement and place.
- Parking
- Toilets
- First Aid
- Security
- Information Center
- Food / Beverage

10.3 Advertising

Most important in creating an advertising campaign is matching the message to the market. Organizers should create a message best suited to the particular event, develop an understanding of who they want to receive that message and employ the proper media mix to convey the message within budget constraints. Regardless of how strong the message, if it doesn't reach the right people, money and effort will be wasted. A well developed website that works to brand and differentiate, as well as market and provide information is a good first step.

Ideally, there will be an advertising budget but no matter the amount, looking for ways to leverage paid advertising with free promotion is important. Avenues for free advertising include:

- Word of Mouth - The first place to start is with your members and supporters. Use meetings, regular communications and newsletters to let them know about an event and encourage them to tell their friends and friends of friends. Word of mouth is still one of the most powerful selling tools because it also comes with a reliable, credible endorsement.
- Selling tickets - Committee members and their networks can carry tickets to sell. Regular checks should be made in order to keep track of remaining tickets and to ensure proper bookkeeping.
- Email bulletins - Members/supporters/business partners should be included on all emails to stay informed about the event and to keep it front of mind. They should also be encouraged to pass on the message to their networks.
- Have all emails market the event - Add a paragraph to email signatures to advertise and give updates.
- Fast forward - Ask committee members and supporters to post information on any social media site or notice board they think would be appropriate.
- Posters / Flyers / Brochures– Finding a volunteer with graphic design expertise is extremely helpful. Short of that, employing a good designer, provided it works within the budget, will work to create a unique and

noticeable look to the event. Compelling design that gets attention will help drive other forms of promotion.

- Shops / Restaurants - Many local businesses are willing to help advertise events that work to bring people downtown. Ask to display posters, literature and if they'll spread the word via their social media.
- Signs / Billboards – Businesses may allow signs on sidewalk space outside their establishments. Look for high traffic areas. If the budget allows, billboards should be placed where the highest volume and right demographic will be reached.

For a good cause

- Many advertising agencies will offer pro bono work for a cause they support. If not free, some may offer discounted rates. Having professionals help brand and market an event goes a long way toward its success.
- Other's mail - Local businesses that do regular mailings may allow event literature to be included in one of their mailings. It also provides an option for businesses that are unable to support the event financially. The South Bend Water Works provides a schedule of upcoming events in their regular mailings, so be sure to take advantage.
- Other's correspondence - School newsletters, local associations, arts organizations and neighborhood groups may allow advertising in their publications.
- Local politician's newsletters – Politicians have a large network to communicate with constituents and may be willing to promote an event in an online newsletter.

Feed the Media

- Newspapers – The South Bend Tribune and others look for stories that will be of interest to their readers. Send a Press Release once details for the event are confirmed, with professionally prepared photos and letterhead. The release should not be written like an advertisement but concisely, it should seem newsworthy, be of interest to the public, and informational.
- Radio / TV – Paid advertising is always an option and targeting the right stations and programming is necessary to reach the right demographic. For cost free promotion, send the Press Release to local radio and television stations as well newspapers. Most local stations look for content and want to be seen as a strong supporter of the community. Radio shows, and morning television will likely be willing to have committee members on air to interview about the upcoming event. Once interviews or stories have been aired, the organizing committee can use those as content for the website and all social media.

- Depending on the time of year of the event, don't overlook utilizing media, social networks and advertising material distribution opportunities at all colleges and universities as well.
- Inthebend.com as well as other appropriately oriented websites and blogs, as well as local, free magazine publications have Calendar of Events sections that may be the easiest and the most effective free advertising available. Again, take any online presence and redistribute in emails and social media from the organizing committee. Redistributing Calendar of Events sites not only promotes the event but positions its organizers as partners with the wider community.

Extra Tips

- Always get copy to the media in time by knowing in advance all submission dates.
- To the extent possible, survey ticket buyers as to how they became aware of the event. The more information gained the more likely future campaigns will be better targeted and more successful.
- When approaching businesses for any of the services needed to hold an event, ask for donations, in the form of in-kind services, volunteer help, or sponsorship dollars. It never hurts to ask.
- Review the strategy to determine the best cost-benefit ratio for paid advertising and the most efficient use of time for unpaid.
- Be prepared and have a fantastic event! If the marketing campaign is successful and many people come out to participate but have a bad experience, no amount of advertising in the future will be able to make up for the perception that it's an event not worth attending. Also, news of a great event spreads quickly making future marketing easier.