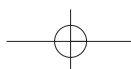


Facing Page

When people come together for a festival, hundreds of details must be coordinated to deliver a safe and enjoyable event. *Photograph by Mike Rudahl, courtesy of Expo Events, Inc.*



CHAPTER 2



The Event Element Assessment

We think in generalities, but we live in detail.

—ALFRED NORTH WHITEHEAD

IN THIS CHAPTER YOU WILL LEARN HOW TO:

- Determine the purpose and prioritized goals and objectives of an event.
 - Assess the needs, available resources, and time restrictions of an event project.
 - Identify the event elements, determine their logical sequencing, and develop efficient schedules.
 - Identify problem areas in the event plan, evaluate available options, devise appropriate contingency plans, and procure proper insurance coverage.
-

As the event coordinator and her husband were walking through a large festival, enjoying the sights and sounds, watching the action and the audience, her husband commented on the sheer size of the event, marveling at what it must have taken to put all this together. The event coordinator smiled at her husband and said, “Honey, it’s just a longer list.”

Event coordination is all about “the list”—what goes on the list and why. Event coordination is the visualization, organization, and synchronization of the event elements and the tasks required to implement them. To create that list, you, as the professional event coordinator, must define the purpose of the event and analyze all the desires, demands, assumptions, and constraints involved to determine the products, materials, services, activities, and suppliers to be included in the event project. You will not need to include every component discussed in this book in every event, but you should consider each to ensure you deliver an event that meets the needs and expectations of those attending and investing in the experience.

Think of the event element assessment in terms of three “tents”—the *intent* (purpose), the *extent* (scope), and the *content* (program). In the world of project management, conducting the needs assessment is part of Project Scope Management. The event scope definition is derived from the identified need, request, or requirement for the event (purpose of the event and outcome/benefit expectations), the product description (type of event), the product analysis (event components), and the feasibility analysis (balance of resources), resulting in a Work Breakdown Structure

and Activity Schedule. There are references to project management throughout this chapter, because using project management as a discipline will help you consistently coordinate events of any size or context efficiently and effectively.

Needs Assessment

Need is a complex term. People do not buy an airline ticket because they *need* an airline ticket—what they *need* is to be in Pittsburgh on Friday or in Paris on Tuesday. You must remember that you are not just taking an order. You are crafting a solution to what the client truly needs.

Defining needs is a critical component of the ability to deliver a successful event. Needs, however, are not always apparent or fully considered. “I need a wedding reception” is certainly not enough to direct your design and delivery of a reception event for this client. It is definitely not enough to ensure that the event you coordinate will be a success, even if you have coordinated hundreds of other wedding receptions. Marketing consultant Robert Middleton advises, “You cannot assume what success would look like. You have to ask. You have to get specific answers.” A needs assessment should provide these answers. A feasibility study then shows the viability of achieving success—the outcome envisioned by the client—by defining the event elements and requirements and putting them into the context of reality. (See Figure 2-1.)

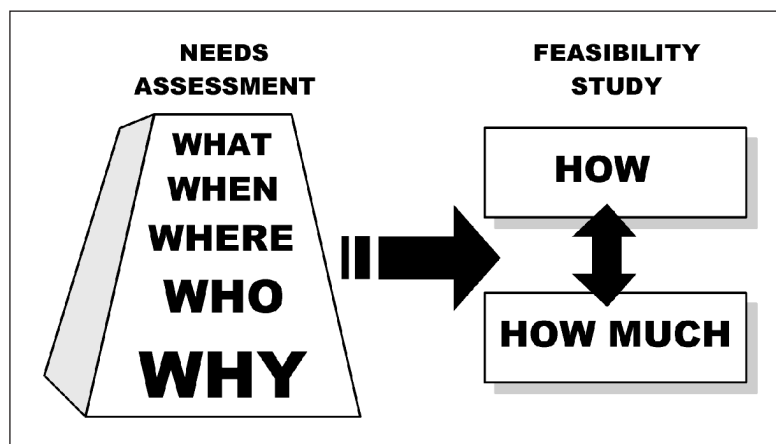


Figure 2-1
The Needs Assessment and Feasibility Study

Answers to Rudyard Kipling's "six honest serving men"—why, who where, when, what, and how—provide the information needed.

- WHY—the purpose of the event is the foundation that drives all other decisions about its scope and the event elements to be included.
- WHO—provides the audience or guest profile.
- WHERE and WHEN—provide the logistical parameters as well as creative opportunities.
- WHAT—determines the event context, content, and mandate.
- HOW determines HOW MUCH—how much in the way of resources will be required.
- HOW MUCH determines HOW—how the resources will be allocated.

CUSTOMERS, CAPABILITIES, AND COMPETITION

The marketing mantra "know your customer" is as applicable in event design and coordination as in any marketing realm. There are, however, many different customers you must serve during an event. There will be clients, users (guests and attendees), and numerous other stakeholders and influencers to consider. Each will have an impact on the event elements to be included.

Customers

Create a customer profile for each constituency you will need to serve, including demographics, lifestyle and life stage, purchase stimulus, and benefits sought. The profile of each of these customer groups will reveal needs and desires that should be factored into the event element analysis and plan. For example, you might use a generational marketing consumer profile, such as shown in Figure 2-2, when determining the features and activities for a tourism festival or convention program.

The Travel Industry Association of America (TIA) and the National Geographic Traveler sponsored a large-scale national study of the current and potential consumer market for geotourism, defined as "tourism that sustains or enhances the geographical character of the place being visited—its environment, culture, aesthetics, heritage, and the well-being of its residents" (www.tia.org/Press/pressrec.asp?Item=176). The results indicate that Traditionalists are conservative in their travel choices, looking for predictability and high levels of cleanliness, safety, and security. Baby Boomers show a distinct preference for culturally and socially related travel, and many are looking specifically for upscale travel experiences. Gen-Xers and Millennials want to be very busy and active when they travel and are seeking to be entertained and to have fun.

Generational Names	Traditionalists Silent Generation Matures	Baby Boomers “Me” Generation	Baby Busters Gen-Xers 13th Generation	Echo Boomers Millennials Generation Y
Approx. Birth Year	–1945	1945–1960	1960–1980	1980–
Character	Adaptive	Idealistic	Optimistic	Empowered
Values	Conservative	Driven	Risk-takers	Tenacious
Focus	Family	Civilization	Environment	Community
Thrive on	Rewarding social experiences	Individual growth and improvement	Truth and flexibility	Speed, change, and information
Technology	Telephone	Mainframe computers	Fax and personal computers	Wireless and handheld
Media	Radio	Television	Cable TV	The Internet
Entertainment	Nightclubs	Coffee shops	Action/adventure	Extreme/authentic
Learning Style	Avoid jargon and show respect	Q & A time important	Stimulating and relevant	Short duration and hands-on
Fashion	Formal	Sexual	Asexual	Androgynous
Music	Swing/Big Band	Rock and Roll	Disco/Pop/Heavy Metal	Rave/Grunge/Rap

Sources: Graeme Codrington (1997), *Generations: From Silent, through Boomer and X, to Millennial*, www.youth.co.za/generations.htm; Robin E. Craven and Lynn Johnson Golabowski (2001), *The Complete Idiot's Guide to Meeting and Event Planning* (Indianapolis: Alpha Books); Ann Fishman (2001), *Generational Targeted Marketing*, www.annfishman.com; Donald Getz (1997), *Event Management and Event Tourism* (New York: Cognizant Communications Corp.), 28–32; Philip Kotler, John Bowen, and James Makens (1999), *Marketing for Hospitality and Tourism*, 2d ed. (Upper Saddle River, NJ: Prentice-Hall); Walker J. Smith and Ann Clurman (1977); *Rocking the Ages: The Yankelovich Report on Generational Marketing* (New York: Harper Business), www.uiowa.edu/~commstud/adclass/research/ages1.html; The Gail Tycer Company, *Generational Marketing*, www.gailtycer.com/articles/generate.htm.

Figure 2-2

Silvers Event Guest Profiler

Capabilities

The capabilities you must consider include your ability to handle the event in its proposed scope and context, the availability of products and services, and the features of the event site. Although the core processes remain the same, coordinating a large festival for a civic celebration is different from producing a multicity product launch for a major corporation or the perfect wedding celebration. Each event context will have its own set of parameters and a specialized body of knowledge. You need to be completely honest with yourself and your client about your ability to deliver the event required and desired.

The world has gotten much smaller through the various forms of new communications technology, and vendors and suppliers to the event industry have embraced this opportunity by expanding their geographic markets. However, not all products and services are available or affordably accessible in all parts of the world. You must know what you can and cannot reasonably obtain in your area and through your supplier resources.

The site selected for the event also involves capabilities that must be examined. These present a set of constraints, as well as creative possibilities, to be incorporated into your event design and implementation strategy. Site issues and implications are discussed in depth in Chapter 3; the event site and/or venue is a key component of a needs assessment, and in determining the elements that must, should, and could be included in the event.

Competition

Considering the competition includes a determination of what will be competing with your event for the time, money, and emotional investment of the attendees or guests. If you are coordinating a fund-raising event, you will want to ensure that it is not scheduled at the same time as other charity functions competing for the same patrons. If you are coordinating a festival designed to increase tourism to your area, you will need to evaluate the assets of other tourism destinations and events. If you are coordinating an incentive event for General Motors at an exotic destination, you can be assured that the company does not want it in the same place and at the same time when Toyota is there.

You may also need to consider the situation of a single event within an entire event program. What else will be happening before, concurrently, and after the event? If the event you are coordinating is a hospitality reception in conjunction with a conference or convention, you will want to know what other receptions will be taking place and when, as well as where this reception fits into the overall agenda. You may be re-

sponsible for only this one reception, but you want it to become part of the overall event experience, as well as achieve the attendance expectations of the host client.

PRIORITIZE GOALS AND OBJECTIVES

A needs assessment helps you determine expectations so that you can define the scope and the specifications that result in an event that satisfies the customer's needs and desires—the project deliverables. It is critical that you work with your client to specify the goals and objectives for the event and to put them in a prioritized hierarchy (see Figure 2-3). You must clarify what the client is trying to attain, achieve, or accomplish. The client may not be able to articulate this immediately or succinctly. You may need to probe for the stated objectives, the unstated objectives, the hard objectives, and the soft objectives.

On-Site Insight

Patrick Delaney, CITE, partner and CEO of Ovation Group, an award-winning Destination Management Company in Dublin, Ireland, specializing in incentive events, notes that hard objectives for incentive programs include increased sales, increased profits, product awareness, and raised productivity. Soft objectives include camaraderie and team bonding, peer recognition, company loyalty, and education or training. For incentive programs, the hard objectives are linked to very specific and measurable targets that the winner must have met in order to receive the incentive travel award. Therefore, the events included in the incentive travel program must be worthy of the effort required to win; they must be exceptional and something the winners could not have orchestrated on their own.

Wouldn't it be great if all event goals and objectives were so precise and the expectations so well defined as Patrick Delaney notes in the On-Site Insight above? Unfortunately, this is not usually the case. More often the task is to help clients put their needs and desires into words, probing to determine what they mean by what they say. Return on investment (ROI) applies to the corporate world as well as to associations,

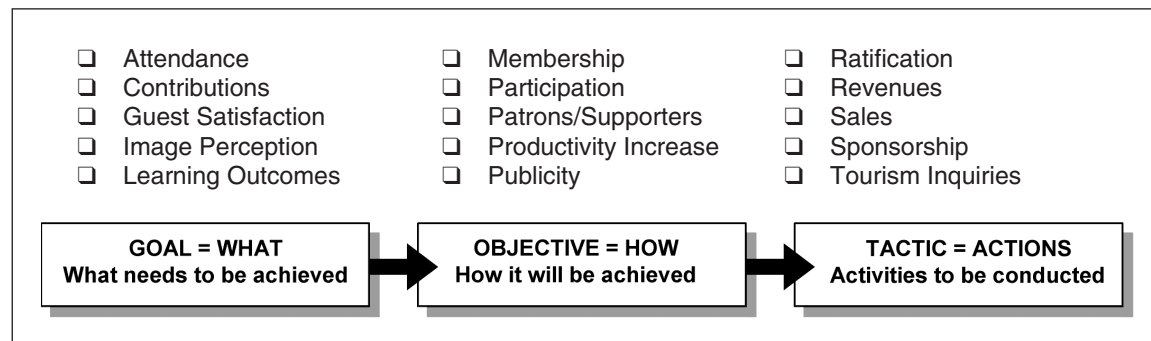


Figure 2-3
Goals, Objectives, and Tactics

governments, charitable organizations, leisure and entertainment organizations, and private individuals. You must seek a definitive description of the return expected for the investment made.

If you are coordinating a 50th birthday celebration, does your client want specific people in attendance? If you are coordinating a corporate event, are there measurable areas of market share growth expected? If you are coordinating a festival or association event, are there particular constituencies that must be served? If you are coordinating a sponsored event, what are the sponsors' marketing objectives?

To put this in perspective, suppose you are coordinating a conference for your professional association. The costs to a delegate may include a registration fee of \$600, an airline ticket at \$500, a hotel room at \$600 (4 nights \times \$150/night), and meals, business center services, and other incidentals may add up to \$400. Add to that \$900 for a week away from work (a factor all too many organizers ignore), and the cost to the delegate is \$3000. To achieve a positive ROI, the delegate will have to come away from that conference with a \$3000 idea.

Goals and objectives must not only be defined, they must be measurable. (How will you know if you have delivered that \$3000 idea?) The acronym SMART, devised by George Doran for an article on writing management goals and objectives for *Management Review* in 1981, illustrates the qualities required of goal and objective statements.

Specific	Must be specific in targeting an objective
Measurable	Must have a measurable indicator(s) of progress/success

Assignable	Must be capable of being assigned to someone to accomplish
Realistic	Must be realistic within allotted resources
Time-related	Must have a specified duration

Without the goals and objectives specified, you will not be able to describe the results expected. You will not be able to define the scope of the project, specify the scope of your responsibilities, control the extent of your obligations, nor evaluate your success.

Event coordinators invariably encounter the “could-you-just” syndrome—“Could you just add candles to the centerpieces?” “Could you just have your people put up these flags behind the dais?” “Could you just change those table linens from red to blue?” The client keeps adding or changing one more thing, and one more thing, and one more thing, expecting there to be no change in the resources provided. (Changing the linen color, even if feasible, can involve numerous telephone calls, various pieces of paperwork, perhaps even additional costs.) In project management this is called *scope creep*—the scope of the project keeps creeping outward. Without establishing clear parameters and objectives, you will not be able to identify the appropriate event elements, sequence the tasks efficiently, or effectively manage the resources for the event.

How do you determine the prioritized goals and objectives? You ask. You probe. You listen. Using a comprehensive Client Interview Form (see Appendix 1) and a consultative selling process, you keep challenging the client, in a nice way, to define the guest reaction and/or results expected. Once the list of goals and objectives is established (with the measurement of success defined), you must work with the client to rank them in order of precedence and preference. You need to determine which event elements are absolutely necessary, which will enhance the event significantly, and which would simply be nice to have. This information will be critical when you begin to analyze feasibility and find that you must ask the client, who wants the sun, the moon, and the stars, to decide whether he or she wants the sun, the moon, *or* the stars.

FEASIBILITY, PRIORITY, AND IMPACT

Once needs are identified and the prioritized goals and objectives established, you must blend creativity with practicality. You must identify the resources and any obstacles to determine the practicality of the project and the potential for success. Resources include time, money, human-power, information, space, and service availability. Each one of these can be an advantage or become an obstacle. You must make sure that you have a reasonable balance of resources to allocate to achieve the event requirements.

Michael C. Thomsett, author of *The Little Black Book of Project Management*, states, “True creativity demands a methodical, organized approach,” and recommends getting the answers to these questions:

- What is the purpose of this project [event]?
- What will the outcome look like?
- What is my responsibility?
- What is my authority?
- What is my budget?

As noted earlier, the event must meet the prioritized needs and goals and objectives of the client and other constituents. Therefore, another set of questions you should ask that will help to prioritize the event elements to be included might be the following:

- | | |
|----------------------|-------------------|
| What must be done? | Is it doable? |
| What should be done? | Is it affordable? |
| What can be done? | Is it meaningful? |

It is critical to remember that in considering each potential event element, there are conditions and consequences that come with each choice. Each element has or can have an impact on virtually every other element. As when pebbles are dropped into a still pool of water, there are ripples that expand out in all directions. Selecting a theme for a party will drive decisions about the invitations, site selection, décor, food and beverages, entertainment, and party favors. Selecting pin spots to highlight the centerpieces on the banquet tables will affect the timing of when the tables can and must be positioned and dressed (the lights must be rigged before the tables are positioned, and then focused after the tables have been positioned and dressed).

COMPREHENSIVE PERSPECTIVE

The event experience must be considered from threshold to threshold and considered from the guests’ point of view. Drawing on your experience with previous and similar events, as well as the history of this or comparable events, you identify the event elements that will deliver the required results to the client and the desired benefits to the attendee. You then examine the implications of each element within the overall plan. (See Figure 2-4.)

An event does not happen in a vacuum. You must include a comprehensive perspective of your different customers, plus the internal and external stakeholders, in analyzing their needs, wants, and mandates. Depending on the event type, the stakeholders or influencers you can be dealing with may include corporate executives, boards of directors, sponsors, family members, public bureaucrats, or regulatory officials. You

INTENT & EXTENT	CONTENT																							
	Invitations/Brochures	Printed Collateral	Promotions/Advertising	Public Relations/Media	Protocol/Etiquette	Sponsorship	Intellectual Property	Transportation/Travel	Parking/Services	Housing/Services	Handicap Services	VIP/Guest Services	Traffic/Crowd Control	Registration/Admission	Signage	Theme Design/Decor	Seating/Credentials	Tents/Equipment	Environment Control	Security	Medical/Emergency Svcs	Communications	Storage/Prep/Admin	Power/Utilities
SCOPE MANAGEMENT																								
Assessment																								
Definition/Design																								
Change Control																								
Evaluation Specs																								
SITE MANAGEMENT																								
Specifications																								
Inspection/ADA																								
Selection/Contract																								
Layout/Diagrams																								
TIME MANAGEMENT																								
Task Definition																								
Sequencing																								
Duration Estimation																								
Schedule Dev.																								
Schedule Control																								
FINANCIAL MANAGEMENT																								
Resource Definition																								
Cost Estimating																								
Budgeting																								
Cost Control																								
HUMAN RESOURCES MANAGEMENT																								
Stakeholders																								
Org. Structure																								
Support Staffing																								
Labor Needs																								
Volunteers																								
Mgmt./Leadership																								
COMMUNICATIONS MANAGEMENT																								
Definition/Planning																								
Info Acquisition																								
Info Distribution																								
Reporting																								
Documentation																								
RISK MANAGEMENT																								
Identification																								
Analysis																								
Response Planning																								
Monitoring/Control																								
Compliance																								
Insurance																								
PROCUREMENT MANAGEMENT																								
Definition																								
Solicitation																								
Selection																								
Quality Control																								
Contract Admin.																								
CLOSEOUT & EVALUATION																								
Performance Review																								
Evaluations																								
Financial Reports																								

Figure 2-4
The Silvers Event Coordination Matrix

must conduct a situational assessment of the macro- and microenvironments in which the event takes place. Macroenvironments include the economy, community and constituent sociocultural demographics, and governmental influence. Microenvironments include industry-specific factors, competitive forces, and supply and demand. Failure to scan these environments and identify the needs of internal and external stakeholders can cause problems when it comes time move in and set up, not to mention contributing significantly to *scope creep*.

Analyzing Resources

Management is allocating, directing, and controlling resources to achieve objectives, and resources, by definition, are limited. The professional event coordinator must balance the “need” with the “have,” making sure that what must be done can be done with the resources available for the event project. (See Figure 2-5.)

TIME, MONEY, AND HUMANPOWER

Of all the resources at your disposal, time is the one resource that is finite. When clients really want something that is not included in the budget, there are usually ways to find more money to make it happen. When money is short, volunteer humanpower can often fill in the gap. When

Resource	Project Management Process		Event Output
Time	➡	Time Management	➡ Schedules
Money	➡	Financial Management	➡ Budget
Humanpower	➡	Human Resources Management	➡ Organizational Chart
Information	➡	Communications Management	➡ Production Book
Space	➡	Site Management	➡ Site Plan
Suppliers	➡	Procurement Management	➡ Requests for Proposal and Bid Specifications

Figure 2-5
Controlling Resources through Event Project Management

space is limited, creative options such as adding a tented area are often possible. But when you have run out of time, you have run out of time. You cannot beg, borrow, or steal more.

This is the primary difference between event project management and other realms of project management. The event's date, which is virtually always fixed, not flexible, is the starting point of project time management, rather than the project management process determining the completion date. Time restrictions will determine the tempo of the event project.

Monetary resources must be allocated carefully. It is important to remember that everything will cost something. Goods and services require labor and raw materials. Volunteers and donated items will incur administrative and hospitality costs. Securing more money through sponsorships, gifts, and grants will have costs attached. Even assessing needs and analyzing event resources take time, and time is money. Nothing is free. The more limited the budget, the more focused you must be on the event goals, but a quality event does not depend on a large budget.

Your humanpower resources may include part-time or full-time paid staff, casual or temporary labor, or a volunteer corps. Depending on the type of event, these human resources may be secured through recruitment, hired through various agencies, or provided by the sponsoring organization. Your human resources must be assessed based on experience and expertise, as well as their availability within the schedule requirements.

CALCULATING REALITY

You must be brutally realistic about the quantity and quality of the resources committed to the event project. Insufficient resources in one area may be mitigated by additional resources of another type—for example, less time = more humanpower, insufficient number of volunteers = more money for support staffing. However, if there are insufficient resources all around, the scope of the event may have to be reduced.

You must validate the budget and the availability of additional money if required. You must specify the Work Breakdown Structure and analyze the schedule to be certain that what needs to be accomplished can be accomplished within the time constraints. You must assess the capabilities and availability of volunteers and vendors. You must verify the facilities and capabilities of the site selected. And you must calculate the realistic likelihood of achieving the level of success expected.

DELEGATION AND DIRECTION

The professional event coordinator must always work within a team, even if he or she is a sole, independent practitioner. There are always vendors, suppliers, support staff, and volunteers or helpers involved in

an event project. Their numbers can range from a few family members and a couple of suppliers to the hundreds of vendors and 26,000+ volunteers and staff included for the 2002 Winter Olympic Games in Salt Lake City, Utah.

Big jobs are accomplished by completing small tasks. Utilizing these humanpower and vendor resources requires delegation and proper direction. The professional event coordinator maintains the focus on the big picture and delegates the task assignments. Project management consultant James P. Lewis, author of *Fundamentals of Project Management*, notes, however, that “delegation does not mean abdication.” Well-trained, experienced personnel may be utilized because they are usually more cost-effective, yet everyone, including professionals, will need direction. There will be lots of pieces to the puzzle, and the event coordinator is the one who knows what the final picture should look like.

Logical Sequencing

Two of Stephen Covey’s *Seven Habits of Highly Effective People* are to “begin with the end in mind” and to “put first things first.” These could arguably be the essence of the logistics and logical sequencing of the event elements. There will be a natural order and a necessary order in which the various event elements (and the tasks associated with them) will have to be chronologically organized. Certain event elements and tasks will have to be sequential and others may be simultaneous, and many of the controlling and monitoring processes of event coordination are iterative.

Logical sequencing follows a critical path, meaning that some tasks will be dependent on other tasks having already been completed, and some tasks will be affected by the way in which others have been done. Developing the logical sequencing for an event depends on sound reasoning, collecting the specifications, and understanding the interdependencies. In project management, this is Activity Sequencing, which will depend on the activity list, mandatory dependencies, external dependencies, and milestones (the completion of major and requisite deliverables or tasks).

IDENTIFYING EVENT COMPONENTS

The components of an event project will, of course, depend on the type and scope of the event. As you envision the Six Dimensions of an Event Experience in Figure 2-6 and scan the elements in the Content column of Figure 2-4, you will identify the features, activities, supplies, products, services, and vendors that must go on your list. Each dimension, each

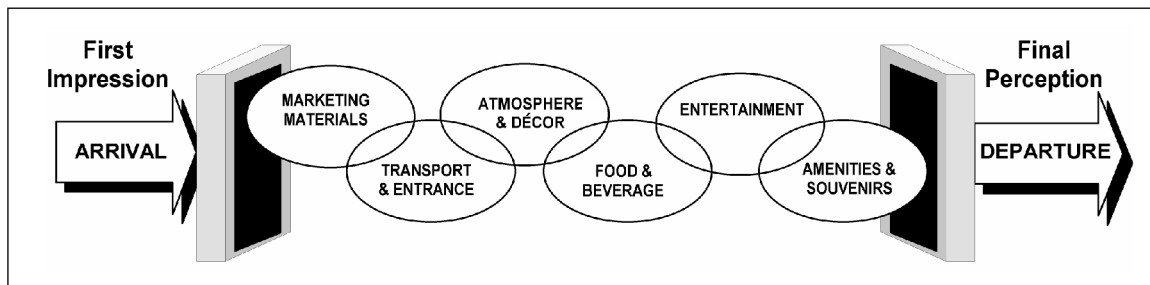


Figure 2-6
The Six Dimensions of an Event Experience

feature, each product or service will indicate certain characteristics and options, as well as additional operational requirements.

For example, if you decide to include colorful fabrics, spandex, or vinyl stretched from a high ceiling to the centers of the buffet displays to indicate their positioning within a cavernous space, you will probably need to secure a scissor lift or high jacker to install them. You will also have to ensure that the material used complies with the fire codes of the particular jurisdiction. In certain jurisdictions (e.g., Las Vegas, Nevada), you must have the installation done by a professional rigger from a specific labor union.

As you visualize the event experience, from threshold to threshold, itemize the elements that will or should be included. Then analyze each of these elements to determine the products and/or services that will be required for implementation, as well as the likely impact they will have on the other elements. You will also have to consider the administrative issues, marketing implications, and risk management ramifications.

FLOWCHARTS, OUTLINES, AND STORYBOARDS

A time line can serve as your event flowchart, illustrating the flow of the tasks necessary to produce the event. In project management, this begins with the Work Breakdown Structure (decomposing the event into its elements and components), which facilitates creating the Activity List (the tasks associated with each element). You then identify the interdependencies to create the Activity Sequencing and estimate the duration of each activity. Thomsett suggests the following flowchart rules:

- *Always use the precedence method;* what fits where and when according to what precedes it and what follows it.
- *Make sure the path of activities and events makes sense;* the path works when it is arranged logically.

- *An activity cannot occur until a preceding activity or event has been completed*; there will likely be numerous concurrent activities that must be precedence-connected.
- *Carefully plot, explain, and control concurrent events*; these concurrent activities may have individual flowcharts (and different team members) that must be supervised carefully.
- *Exercise control over weak links*; the flowchart helps you identify the weak links in the process that must be monitored.

The Work Breakdown Structure, Activity List, and Activity Sequencing may be composed in an outline form, either a Harvard or numerical outline, or can be generated via a mind-mapping technique or a scalar organization (see Figure 2-7). Some find the storyboard method effective—creating a card for each task and arranging the cards in groups and chronological order. You should lock in the most important items first, incorporating the chronology, priority, and flexibility of each.

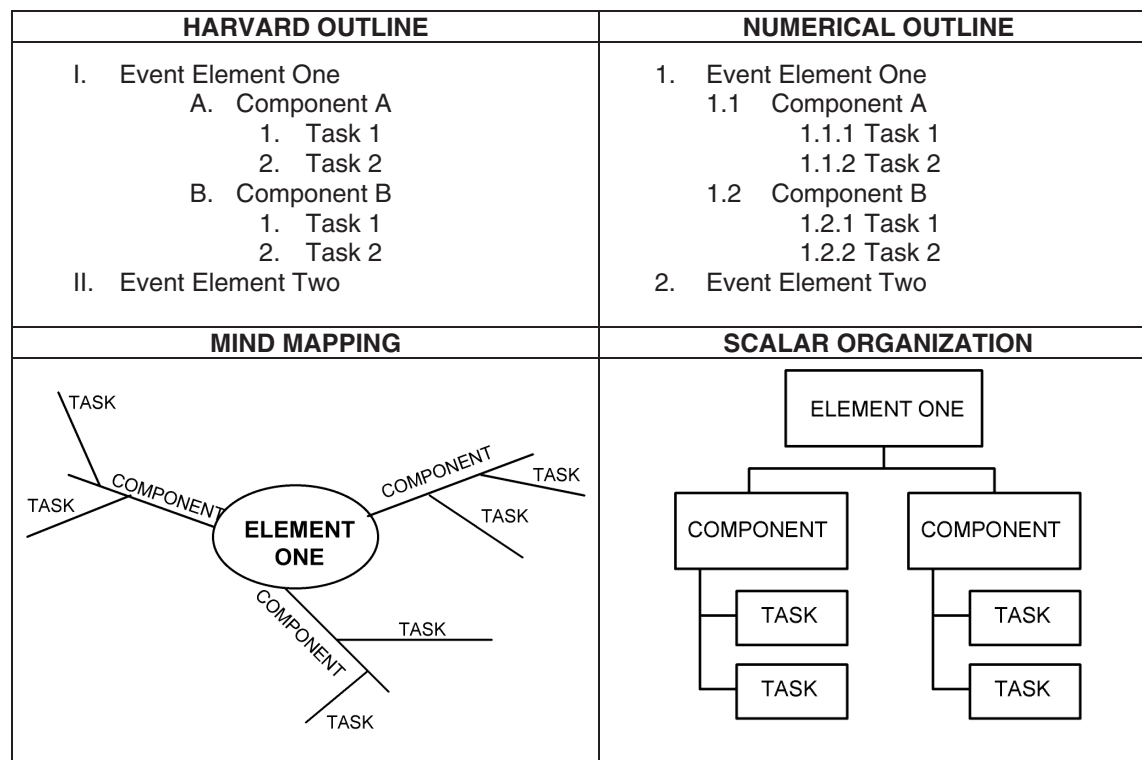


Figure 2-7
Flowchart Styles

COLLECT SPECIFICATIONS AND DIRECTIONS

Once the list of event elements is prepared, the specifications must be determined. Consider the quality level or type of product or service that will be appropriate for the event style and context. For example, name badges can be handwritten on paper badges with sticky backs, printed on card stock and inserted in plastic holders, or embossed on plastic cards (like credit cards) with large amounts of data imbedded in a magnetic strip on the back, and can cost anywhere from a few cents apiece to double-digit dollar amounts each.

Ascertain the installation or implementation requirements for each element. You must thoroughly understand what resources (time, money, manpower, and space) will be required for each product or service. For event elements, products, or services associated with disciplines with which you are unfamiliar, collect this information through research, your colleagues on the event team (i.e., scenic designer, catering manager, or graphic designer), or directly from the vendors and suppliers you will be contracting (remember, they should also be practicing consultative selling). Include the following specifications.

- **Product**—quantity, quality, features, or brand specifications
- **Time**—fabrication/installation/removal duration; sequence restrictions; materials and/or information dependencies (what a vendor needs you to provide before it can begin)
- **Space**—dimensions; proximity requirements and/or restrictions
- **Humanpower**—number of people required to install/operate/remove (number to be included by provider and/or number to be provided by event organization)
- **Accessibility**—number and type of delivery vehicles; proximity requirements and/or restrictions
- **Other**—power requirements and other utility needs; installation equipment requirements; special permits, compliance instruments, and/or insurance requirements

RECOGNIZING BOTTLENECKS AND OUTSIDE INFLUENCES

You must understand what each provider will do, what equipment or materials each needs to be able to do it, how much time is needed to do it, and what impact that may have on other providers. Of particular note, you will have to integrate and synchronize those tasks and those providers who will need to be occupying the same or contiguous space or time in the sequence in the schedule. When setting up an event on-site, the activity will be fast and furious and you must carefully choreograph this delicate dance of possibly hundreds of people coming together in the same space at the same time to create, operate, and participate in the event experience.

The event elements must be arranged in order of priority, logistics, and chronology. Tap into your own experience and the experience of others to recognize, anticipate, and alleviate potential congestion and conflict before it can result in financial or productivity problems. In project management this is called Project Integration Management, which includes Project Plan Development, Project Plan Execution, and Integrated Change Control.

LOGISTICS OF A PROGRESSIVE EXPERIENCE

A progressive event experience is an event program that follows a natural or designed progression from start to finish or threshold to threshold. Not everything happens at once, at least for the individual at the event. At a public festival, for example, there may be different activities and amusements scheduled continuously throughout the day, and the visitor will be experiencing these attractions one after the other. At a conference or convention, there may be numerous concurrent sessions, but the delegate can attend only one at a time. During an incentive travel program, there will be a balance of sightseeing, social events, free time, and rest.

This progression, or flow, of the event will indicate additional operational elements that must be sequenced logically as well. The professional event coordinator must supervise vendors as they replenish supplies and materials, monitor volunteer arrivals and activities, and arrange everything performers or participants will need for their arrival, preparations, waiting, performance, and departure throughout the duration of the event program. This may necessitate dressing rooms, a green room, and/or break areas for staff, volunteers, cast, and crew.

The months of preplanning culminate in an event that is often over in just a few hours. But the party does not end there. You must remember that the breakdown and move-out is an essential component of the event production. It must have sufficient resources allocated (i.e., time, money, humanpower) and must be choreographed as carefully as the move-in and the event itself. So I just smile and nod when an admiring guest comes up to me during an event and bubbles, “Oh, you do parties . . . what fun!” I know that all the hard work was truly invisible to the guest.

Timelines and Schedules

You have identified the event elements, collected the specifications for each product or provider, and identified the interdependencies. Now you must integrate this into a project schedule that includes tracking systems

and control points to ensure that the schedule is effective. Timelines, production schedules, running orders, and scripts should reflect the necessary chronological sequence of the delivery and implementation of the goods, services, tasks, and performances required to produce the event experience.

TIMELINE VERSUS PRODUCTION SCHEDULE

The project schedule or timeline should be presented in a chronological format, which may be a scroll list or a graphical or schematic chart. The scroll list format may be a simple numerical sequence by date (see Figure 2-8). The graphical format may be a bar chart (often called a Gantt chart, named for Henry Gantt, who developed a complete notational system for showing progress with bar charts in the late 1950s) or a network diagram, often an arrow diagram. (See Figure 2-9.) The graphical format may also simply be a calendar. To facilitate monitoring functions, either the scroll list or graphical format should include the name of the person, vendor, or team responsible for each task listed.

The style or format you use will depend on the complexity of the event project and what best communicates the schedule to your event project team. In many cases a combination of formats will be needed for different event elements, such as printing, catering, décor and entertainment. The key for any of these formats is to ensure that Task A is done before Task B as needed, and that it is clear which tasks must be sequential, which are simultaneous, which are conditional, and which are iterative.

Date	Activity	Responsibility	Interdependency Notes
02 Jan 2004	ACTIVITY 1	FRED	
10 Jan 2004	ACTIVITY 2	GINGER	Must have information from Fred's research
16 Feb 2004	ACTIVITY 3	ADAM	Cannot proceed without client deposit
14 Mar 2004	ACTIVITY 4	EVE	Client must approve prior to final order

Figure 2-8
Scroll List Timeline Format

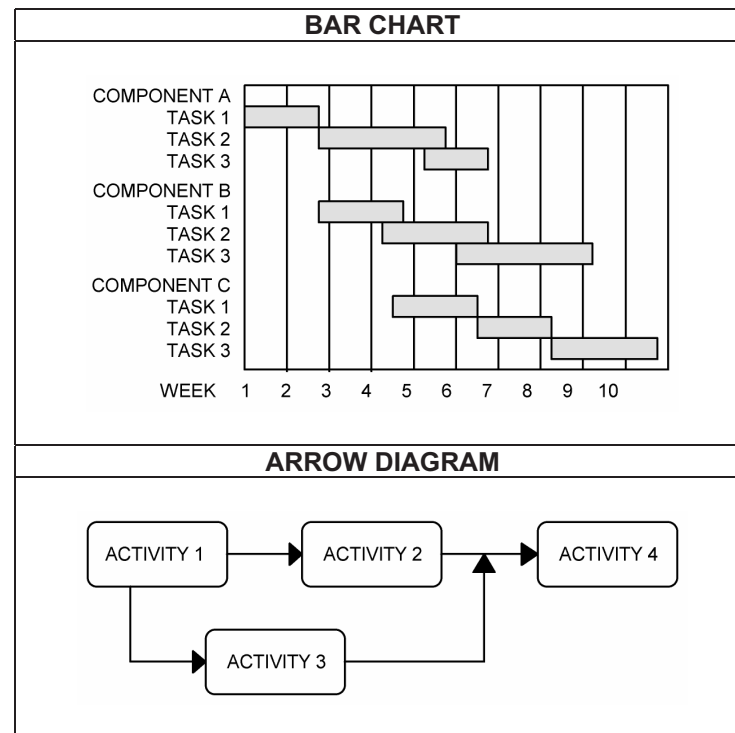


Figure 2-9
Graphical Timeline Formats

Technology Tip

For larger, complex events, the use of project management software will facilitate the event coordination process. This type of software includes the ability to provide the project network diagrams, flowcharts, schedules, and monitoring checkpoints (e.g., Gantt charts, PERT charts, precedence diagrams, arrow diagrams, network loops, GERT diagrams, and system dynamics models). For smaller or onetime events, project management software may be too expensive—both the investment for purchasing the software and the investment of learning/training time to be able to master it. Standard software will likely suffice for organizing and integrating timelines, address files, personal scheduling, word processing, spreadsheets, budgeting, basic reports, and graphics.

As the day of the event nears, the project schedule will shift from the broader calendar perspective to a daily and hourly (or even minute-by-minute) version. This agenda is called a production schedule and is most often presented in the scroll list format, arranged in a table displayed in columns. The number of columns will depend on the type or scope of the event and the information necessary to monitor the schedule. Each column will include a qualifying factor such as starting and ending times, event element or activity, location, person responsible (with contact numbers), and other specifications or notes as required (see Figure 2-10).

For multiday, complex, or mega-events, the production schedule may be dozens or hundreds of pages long and/or require versions specific to individual vendors or event team members. You may create customized schedules that include only the information required by each vendor or group. You might wish to print daily versions for each day of a multiday festival, or you might omit certain elements, such as the arrival time of a specific dignitary that should be confidential for security reasons. However, as changes are made to the master schedule, these updates must be included in the customized versions as well. Also remember that you want your entire team to have a clear understanding of the event as a whole.

The schedule may be printed a variety of ways. It can be printed horizontally or vertically on standard stationery, which would facilitate inclusion in the Production Book (discussed further in Chapter 14) and/or on a clipboard at the receiving dock or registration table. It can be enlarged to poster size and mounted on the wall in the on-site headquarters office. It can be downloaded into a PDA (personal digital assistant) or posted on a company intranet. Again, form follows function; the format should facilitate effective communications.

REVERSE PLANNING TO ACHIEVE REALISTIC SCHEDULING

How do you ensure that you will have all the information required to print the conference brochure or trade show directory on time? How long can you wait to order a customized stage backdrop? How do you establish the entry deadline for participants in a road rally? Professional event coordinators learn to *plan backward*. You collect the specifications data and duration estimations for all the event elements, integrate the critical path of interdependencies into the Activity Sequence, and establish a deadline for each task. With the deadline noted on the calendar or schedule, you move backward on the schedule the amount of time it will take to accomplish a particular task to establish the start date or time.

When estimating the time required for each task defined, you must consider all constraints, assumptions, capabilities, historical information, and mandatory dependencies (the tasks that must be completed

When	Who	What	Where
05h30	SAGC	Driving range set, golf carts staged	@ Cart staging area
06h00	CSS	Start installation for lunch	East lawn
06h30	CSW	Shuttles from hotel begin	Hyatt ABQ lobby
06h30	SAGC	Registration table set	Banquet entry foyer
06h45	All	Breakfast ready	Banquet room
06h45	ASA	Native American flute player ready	Banquet room
07h00	All	Breakfast begins	Banquet room
<i>07h00</i>	<i>CSS</i>	<i>Rain decision re: outdoor events if needed</i>	
07h30	SAGC	Service attendant ready, shuttle carts ready	@ Cart staging area
07h45	SAGC	Bagpipe march	Putting green
08h15	All	Strike buffet breakfast	Banquet room
08h20	SAGC	Gather guests for announcements	@ Cart staging area
08h30	SAGC	Shotguns sound to start play	
08h45	SAGC	Stage carts for 2nd shotgun	@ Cart staging area
10h20	SAGC	Service/pro shop traffic directors	@ Cart staging area
10h30	ASA	Native American flute player until 11h10	Portal @ putting green
11h00	SAGC	Transfer of clubs to new carts complete	@ Cart staging area
11h05	SAGC	Guests report to new carts	@ Cart staging area
11h15	SAGC	2nd shotgun start	
12h45	ASA	Disc jockey set	East lawn
13h00	All	Lunch ready	East lawn
13h05	SAGC	Service/pro shop traffic directors	@ Cart staging area
13h15	All	Lunch begins	East lawn
13h35	SAGC	Transfer of clubs to new carts complete	@ Cart staging area

Figure 2-10

Production Schedule for One Day of a Familiarization Trip for
Incentive Planners at a Golf Resort

When	Who	What	Where
14h00	SAGC	Final shotgun start	
14h15	All	Strike lunch	East lawn
15h00	TRI	Pavilion tent & chairs set	@ 4th hole
15h00	RR	Hot air balloons arrive, start to inflate	@ 4th hole
15h45	ASA	Native American dancers arrive, get into costume	Resort conference room
16h00	SAGC	Sevice/pro shop traffic directors	@ Cart staging area
16h00	ASA	Band begins setup	South lawn
16h15	ASA	Native American dancers ready	Resort entrance
16h15	HYT	Tours of resort facility begin	Resort
16h30	SAGC	Cleaned clubs into storage	Clubhouse
16h30	ASA	Native American dancers begin	Resort entrance
17h00	ASA	Native American dancers transfer to 4th hole	Resort entrance
17h15	ASA	Native American dancers begin—until 17h45	@ 4th hole
17h15	SAGC	Shuttles from resort to 4th hole	Resort entrance
17h30	SAGC	Closest to pin contest	@ 4th hole
18h00	All	Dinner set	South lawn
18h15	ASA	Band ready	South lawn
18h30	All	Dinner begins	South lawn
19h30	SAGC	All carts back to SAGC	Cart staging area
21h00	CSW	Guests depart	South lawn
21h00	CSS	Strike dinner	South lawn
21h15	HYA	Hospitality suite	Hotel
24h00	CSS	Finish setup for breakfast	Banquet room

Figure 2-10
(Continued)

before another task can begin). You need to determine, from your prior experience and a healthy measure of optimistic pessimism, how much time it will actually take to complete a task. Although the industry trend is shorter lead times for event preparation, try to build plenty of flexibility into your schedule. You should be very conservative when estimating productivity and very generous when anticipating problems.

Once you have the initial drafts of both your timeline and production schedule, you should distribute these to your staff, vendors, and/or key stakeholders for review and comment. These draft schedules should be distributed as early as possible to allow time for any changes or concerns to be addressed and incorporated into the final version.

TRACKING AND CHANGE CONTROLS

A carefully crafted schedule is a thing of beauty, but unless it incorporates tracking and control mechanisms, it is next to worthless. In project management you use the Project Schedule with Critical Path Milestones, Performance Reports, and Change Orders to develop the Schedule Control System.

The timeline and production schedule should have the critical milestones and deadlines highlighted, including those tasks or activities that must be completed before another task may begin. With the responsibility for each task assigned to an individual (remember the “A” of SMART objectives), regular performance updates should be plotted into the schedule, including written reports and in-person meetings. These reports and meetings must be scheduled to allot sufficient time to take corrective action if required. Incorporate a Tickler System (to “tickle” your memory) into your timeline, computer scheduler, and/or personal scheduler system.

Change controls include the manner of and documentation required for making any changes to the project scope or the project schedule. The professional event coordinator should develop and utilize a Change Order Form (see Appendix 2) for changes to the scope of the event project. Change notification protocols must be developed to ensure that schedule updates are communicated efficiently and effectively.

Not only are these tracking and change control mechanisms important for keeping the event project on time and on track, they will provide valuable information when coordinating your next event project. This is why you should analyze and document the causes of any variances, the reasons behind the corrective actions selected, and other lessons learned. You should be creating a historical database for this event as well as other event projects so that you may continuously improve your processes and procedures.

On-Site Insight

Robert Hulsmeyer, CSEP, senior partner with Empire Force Events, Inc., in New York City, describes the production schedule as your roadmap to a successful event. He suggests creating a fax cover sheet including a notice requesting each team member to review the schedule, input any necessary changes or additions, and return fax by a certain date. If the schedule is acceptable as is, the team member signs the cover sheet and faxes that back as a record of his or her approval. For updates, Hulsmeyer recommends a schedule be dated as to its last revision, using “As of” or “Revised,” plus the date, on the first page of the schedule. When a schedule has gone through numerous revisions, as happens when an event takes place over several days or has extended load-in and rehearsal days, it is important that all of the team members are working from the most recent version. Empire Force Events, Inc., prints the final production schedule on a colored paper stock, allowing easy monitoring of which version each team member is working from.

Contingency Plans

There are never unlimited resources. There are no guarantees in life. The only constant is change. Stuff happens! Given all of these caveats, it is clear that there will always be a certain amount of risk associated with any event project. The professional event coordinator must carefully identify, analyze, plan for, and manage these risks by examining problem areas and available options to develop suitable contingency plans for identified risks. This task may include anything from an Event “Survival” Kit (see Appendix 3) to a full-blown alternate production plan.

Risk, as defined by the Project Management Institute, Inc., is “an uncertain condition that, if it occurs, has a positive or negative effect on a project objective. Each risk has a cause, and if it occurs, a consequence.” Note that risk is not exclusively negative. There may be a risk that your Concert in the Park fund-raiser is more popular than your wildest dreams and you are selling tickets at an unprecedented rate. At a certain point, you must implement your contingency plan to secure more portable toilet facilities or bring in several more food stalls. This risk can be a good thing.

However, most risk management efforts are directed at the potential hazards associated with an event. In testimony conducted at the Coronial Inquest in conjunction with the crowd collapse death during the Limp Bizkit performance at the Big Day Out 2001 festival in Sydney, Australia, it was determined that there are no international minimum standards for crowd safety or management (www.crowdsafe.com), but there are numerous factors that have been identified as specific to special events, as outlined in Figure 2-11, that may increase the degree of risk but do not necessarily mean the event will be “risky.” (For more on crowd collapse, see Figure 6-7.)

It is important to understand that risk management is an ongoing, integrated, and iterative process. Resources must be allocated, plans must be devised, and a commitment must be made to manage the uncertainties and vulnerabilities surrounding your event. You must examine the worst-case scenarios and the best-case scenarios in order to be prepared with the appropriate contingency plans. (Force majeure risks—earthquakes, floods, civil unrest, and terrorism—generally require disaster recovery actions rather than contingency plans.)

RISK IDENTIFICATION

There are several categories of risk the professional event coordinator should examine: safety, security, capability, internal, and external. Safety risks include physical harm, violence, sanitation issues, and health issues. Security risks include physical or intellectual property loss, property damage, theft, and fire. Capability risks include processes, technology, unrealistic goals, and unrealistic projections. Internal risks include resource allocation, scope creep, and changing priorities. External risks include legal and/or regulatory environments, labor issues, weather, and competition.

Risks are identified by reviewing historical information and industry standards; interviewing subject matter experts; conducting brainstorming sessions with the event team, vendors, and key stakeholders; and sometimes through simulation and scenario forecasting. You should also conduct a SWOT (strengths, weaknesses, opportunities, and threats) analysis, as well as a gap analysis (identifying the gaps in the planning process) to mitigate exposure and any disparities between what the vision is and what will be deliverable.

The professional event coordinator should continuously be developing checklists to serve as the starting point for the risk identification sessions. As the coordinator goes through the event element list item by item, he or she should question all assumptions and consider options as they relate to the cost, schedule, scope, and quality of the activities, products, and services included in the event plan. The causal influences

Organization	
Staffing	Insufficient number, inadequate training, incorrect deployment
Planning	Insufficient time, accelerated tempo, unprepared decision making
Structure	Unclear chain of command and control, unsanctioned leadership
Event Time/ Duration	Unauthorized camping, temporary marketplaces, late night exiting
Audience	
Audience/ Event Type	Open to public—ticketed/free, young/old, sports/music fans
Crowd Size	Crowd crushes, crowd collapses, crowd movement and dispersal, crowd rushes (“Virtually all crowd deaths are due to compressive asphyxia.”—Fruin)
Crowd Density	Insufficient dimensions, access and segregation, crowd mobility
Behavioral Patterns	Mosh pits, heterogeneous groups with different acceptable behaviors, performer behavior, flight responses, mass craze
Unauthorized	Ticketless gate crashers, drug trafficking, picketing and protests
Site	
Venue and Layout	Public or private, private with proximity to public, barrier layout, overoccupancy, traffic proximity, unfenced open space
Arrival	Traffic density, parking facilities, insufficient and congested entrances
Departure	Insufficient routes for mass exodus at close of event
Structures & Facilities	Temporary or unsafe construction, slip and trip hazards (“Wet floors account for 90% of slip and trip injuries.”—agency.osha.eu.int)
Lighting	Inadequate lighting increases the risk of a crowd losing its sense of orientation and lessens social control; electricity usage—cables and cords slip and trip hazards, illuminated pathways/hazards
Environment	Heat exhaustion, dehydration, wet and muddy (frolic behavior), hazardous waste disposal, litter and debris, pollution

Figure 2-11
Sillers Event Risk Factor Analysis

Communications	
Internal	Insufficient communications equipment, lack of centralized command center, inadequate crisis management plans
External	Insufficient public address capabilities and/or protocols, lack of community support, poor media relations
Promotional	Promoting unrealistic expectations, insufficient directions, cancellation
Signage	Insufficient directional and locator signs
Activities	
Arrival	Queue pressure, security searches for weapons/projectiles, mixed-sex search
Hazardous Activities	Thrill rides, unusual/untried tricks, fireworks, special effects—lasers, strobe lights, fog/smoke machines
Entertainment or Program	Concerts—particularly those with festival or general admission seating Content—meetings-cum-demonstrations
Consumption	Alcohol and euphoric substance use
Public Safety	
Antisocial Behavior	Terrorism, theft, violence, sexual assault (“Open spaces where people congregate are very vulnerable to terrorist shootings, bombings, and assaults of other types.”—www.crowdsafe.com)
Authorities	Insufficient police presence, ineffective identification of safety personnel
Emergency Planning	Insufficient procurement, planning, placement, and practice of evacuation and medical assistance services, fire prevention, detection and control

Sources: Alexander Berlonghi (1990), The Special Event Risk Management Manual (Dana Point, CA: Berlonghi); Peter Tarlow (2002). Event Risk Management and Safety (New York: John Wiley & Sons, Inc.); Danish Government Ministry of Culture, Rock Festival Safety, www.kum.dk; William O'Toole, Event Project Management System—Risk Management, http://www-personal.usyd.edu.au/~wotoole/EPMS_Control/Control_Areas/risk.html; Crowdsafe News, www.crowdsafe.com; John J. Fruin, The Causes and Prevention of Crowd Disasters, www.crowdsafe.com; Greater London Authority Carnival Review Group, Notting Hill Carnival Review: Interim Report and Public Safety Profile Recommendations for 2001, www.london.gov.uk/mayor/carnival; Greater London Authority, Future Major Events in London, www.london.gov.uk; Public Events Planning Group, Event Safety: A Guide for Organisers, www.nelincs.gov.uk; National Fire Protection Association, Glossary of Terms, www.nfpa.org

Figure 2-11
(Continued)

associated with each risk identified should also be considered to determine whether there will be several risks driven by a common cause.

RISK ANALYSIS

Once the potential risks are identified, you must assess the likelihood and impact of each. Peter E. Tarlow, author of *Event Risk Management and Safety*, notes, “All event risk analyses should be based on the principle that there is no object, person, or reputation that cannot be stolen, damaged, or destroyed.” You must also prioritize risk based on the potential impact on the event as well as the impact on the resources for the event. Using an evaluation tool such as the Event Probability/Impact Risk Rating Matrix (Figure 2-12), determine which risks can and/or must be avoided and which may be mitigated with additional event elements such as redundant equipment or other contingency planning, based on your event organization’s threshold of tolerance.

As you are considering each identified risk, you must identify and evaluate the available options and their impact on the event’s quality and resources. You must remember one of Norman R. Augustine’s “Laws”: No change is a small change. There will likely be a cost—in money, time, humanpower, or quality—for any contingency plan option selected. Reserving an indoor site or a tent for an outdoor wedding reception in case of inclement weather will likely require nonrefundable deposit money. Securing a portable generator as a backup power supply will incur rental

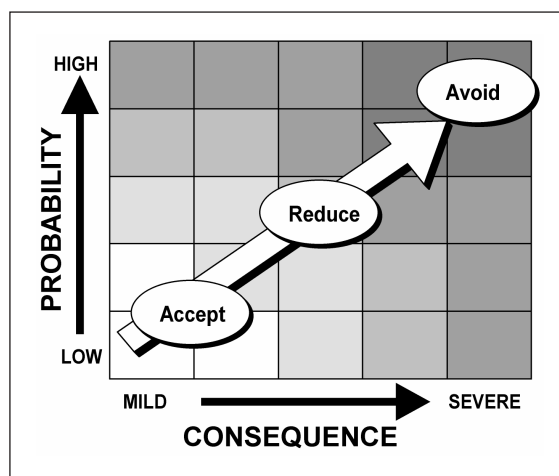


Figure 2-12
Typical Event Probability/Impact Risk Rating Matrix

costs, and the equipment must be plotted into the site plan. Obtaining specialty insurance, such as in the case of the Albuquerque International Hot Air Balloon Fiesta (insuring the airspace above the launch field), may be expensive or available through only one or two providers in the world.

To create a list of potential responses, you might use a Decision Tree (Figure 2-13) to analyze your contingency plan options. (The Decision Tree and the Rating Matrix are common tools used by a wide range of project management scholars and practitioners.) There will often be more than one alternative to any contingency plan option, and each alternative will have its own set of implications, including costs, rewards, and potential residual risks. For example, if you are having a big-name rock-and-roll band playing at a fund-raiser concert, you may need to construct a barrier between the stage and the audience. This barrier could be made of fencing (wire, mesh, or wood), or you could use security personnel lined up along the edge (uniformed guards, off-duty law enforcement officers, or volunteers in event T-shirts).

The fencing option will have costs associated with fabrication and/or installation. It will have an impact on the look of the stage. It may have an impact on the event grounds, depending on the type of fencing and the installation procedures. The security guard option will have costs associated with it as well, either for hiring or subcontracting personnel or for T-shirts for the volunteers. Uniformed security or off-duty law enforcement personnel may create an offensive or militaristic feel to the event, yet untrained volunteers may not be sufficient if the audience is likely to be aggressive about approaching the stage. Clearly, each option and its alternatives must be considered from a variety of perspectives.

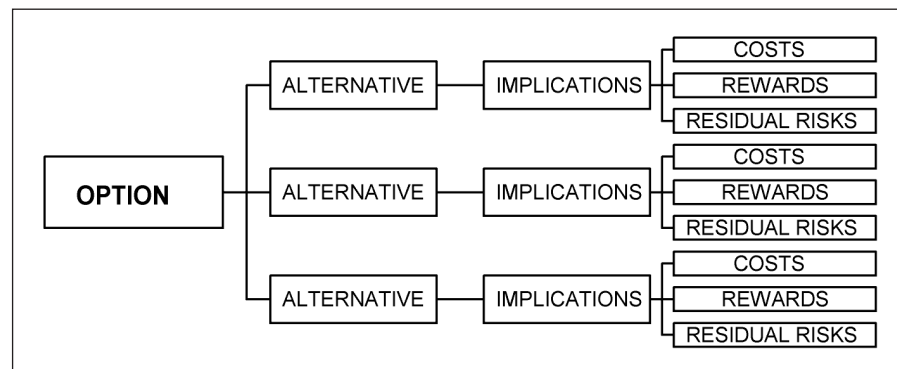


Figure 2-13
Typical Event Decision Tree Analysis

DEVELOPING RESPONSE PLANS

There are four ways to handle risk: avoidance, transference, mitigation (loss control), and acceptance (retention). Avoidance means you do not take the risk at all. Transference means you transfer the risk through insurance, performance bonds, warranties, guarantees, or contractual liability. Mitigation includes incorporating redundancies into your plan and targeting the linkages or causes that control and prevent the potential severity of the impact. Acceptance includes your contingency plans.

With your options identified, communication will be the foundation of the success of your contingency plans. You must specify your reporting format, including how and when decisions will be made to implement any portion of your plans and how this will be communicated to the event team. The triggers, actions, and individuals involved must be determined. Your list of potential responses must be linked with the threshold of tolerance that will trigger the response. You must specify what action steps will be taken. (Robert Hulsmeyer, CSEP, of Empire Force Events, Inc., recommends that a weather contingency production schedule should take the same form as, and be attached to, your fair weather production schedule.) You must also specify those individuals empowered to make the decision to implement a response. To eliminate any false alarms, only one person should be authorized to change, move, or cancel an event element, or the event itself. These roles and responsibilities should be documented and communicated to the entire event team.

You must verify and validate your contingency plans with the host organization or your client so that the resources required to implement a risk response or contingency plan are fully funded and supported. The host or client must be informed of the triggers, actions, and individuals involved and must be included in the communications surrounding response implementation.

TIMELINE INTEGRATION

The contingency plans must be integrated into your timeline so that you will be able to monitor situations and/or conditions and act as required and appropriate. This will include periodic risk reviews, performance reviews, taking corrective action when necessary, implementing change controls, and continuously updating your plan. What happened, why it happened, and when it happened must be included in your documentation procedures.

The professional event coordinator must be proactive rather than reactive. Decisions made in a panic are rarely cost-effective or efficient and often lead to more risk and unpleasant consequences. If at all possible,

incorporate a generous response time into your schedule so that your contingency plans may be integrated into the event plans and implemented smoothly if required. It is better to have the wedding reception weather tent installed and beautifully decorated, but not be required, than to have the bride's lasting memory be a muddy and miserable wedding day.

INSURANCE

As noted, there are four ways to handle risk, one of which is to transfer risk by purchasing insurance coverage. Of course, insurance will not prevent something from happening; it will only lessen the financial impact should it happen. An insurance policy is a legal agreement for transferring risk that defines what will be paid for, in the event of a defined loss, in exchange for a defined amount of money (the premium). The professional event coordinator will work with an insurance broker to identify and purchase the appropriate insurance coverage for the type and size of event that is being produced.

Most purpose-built and commercial venues will require specific levels of insurance coverage, primarily Commercial General Liability (CGL), also known in countries other than the United States as Public Liability Insurance, which usually protects your organization if a volunteer, employee, or other individual, supervised, directed, or whose duties are controlled by the organization, makes a mistake and a patron is injured or has his or her property damaged. This coverage is not universal, however, and you must always check the exclusions in your policy because not all persons injured and all property damaged may be covered. You should always secure Certificates of Insurance from your vendors, particularly those providing their goods and services on-site at the event.

Onetime (often called "one-off") and annual events often require Event Liability Insurance, often called Spectator Insurance, which will be priced according to the type of event and the capacity of the audience, and perhaps the event elements to be included. James N. Decoulos, a Massachusetts lawyer and insurance broker specializing in legal and insurance services for special events, explains that an event liability policy is really a CGL policy issued on an industry standard form, but rather than for the usual one-year term, it is issued for the duration of the event. Decoulos advises that there are basically four kinds of losses that should be addressed with the procurement of insurance coverage, as illustrated in Figure 2-14.

Decoulos notes,

These products apply not so much to the type of event, but rather to the type of business that the event professional conducts. Also, the client bears potential loss and the planner may

RISK OF LOSS		INSURANCE PRODUCT
PROPERTY	Loss of tangible property, such as equipment, intangible property, such as a copyright, or real property such as a building. A loss can even exceed the value of what is lost, for example, the costs associated with removing a building destroyed by fire.	Homeowners Renters Commercial Package Policy (CPP) Building and Personal Property (BPP) Business Owners Policy (BOP) Commercial Crime Inland Marine
LIABILITY	This is imposed, by law, on an individual who causes damage to another individual.	
Tortious	Pertaining to a wrongful act for which a civil lawsuit can be brought; negligence—that is, not acting as a reasonably prudent person would under the circumstances, as a result of which somebody was hurt.	Commercial General Liability (CGL) Liquor Liability Business Owners Policy (BOP) Spectator, Volunteer, Participant Liability
Contractual	Breach of a contract or failure to perform a contract.	None
Professional	Not performing a contract according to the standards of the profession.	Errors and Omissions (E&O) Directors and Officers (D&O)
Statutory	Determined by legislation and legally punishable	Workers' Compensation Automobile Employment Practices
PERSONNEL	A loss to a business when a key person is disabled or dies.	Key Man Life and Disability
NET INCOME	The loss of revenues or increase of expenses when a business is interrupted because of damage to its property or another business upon which the first business relies to operate its business, such as a supplier.	Business Income Coverage (BIC) Business Owners Policy (BOP) Commercial Crime Event Cancellation Nonappearance Weather Prize Indemnification Bonds

Figure 2-14
Decoulos Insurance Analysis

have a duty to advise the client about the risk of that loss and methods to reduce it. For example, if an outdoor event is being planned in the Southeast during hurricane season, a planner, being the professional and thus having certain higher standards of performance, may have a duty to advise the client to get weather insurance or to forgo the event altogether, especially if the client is not from the Southeast and is not aware of the hurricane season. The weather insurance would likely be quite expensive or unavailable, but the risks should be discussed. Failure to discuss the risks could lead to a professional liability claim for which the planner may want insurance coverage to finance any liability that may arise due to damages incurred by the client if the event is canceled or the risk is not otherwise properly managed.

The event professional must also become familiar with various insurance-related documents such as a certificate of insurance, declarations page, binder, policy, and endorsement, as well as the meaning of terms that appear in them such as additional named insured, policy limitations, exclusions, and duties in the event of loss. Insurance is a tool by which risk management is financed. An event professional shouldn't employ that tool without knowing what it does and doesn't do, any more than an audiovisual technician employs a soundboard, or a pyrotechnician employs a detonating device.

Risk is an uncertainty about whether a loss will occur, what peril will cause that loss, and what damage may be done as a result. Once all the efforts have been exhausted at managing the risk by preventing it altogether, reducing the likelihood of its happening, and reducing the severity of it, one purchases insurance to finance it when it does happen [see Figure 2-15].

Target Competency Review

The professional event coordinator conducts an assessment to determine the purpose of and expectations for an event in order to be able to visualize, organize, and synchronize the elements and actions required to deliver the desired event experience. Using the principles and discipline of project management, the professional event coordinator will be able to identify, prioritize, and sequence event elements in a comprehensive and

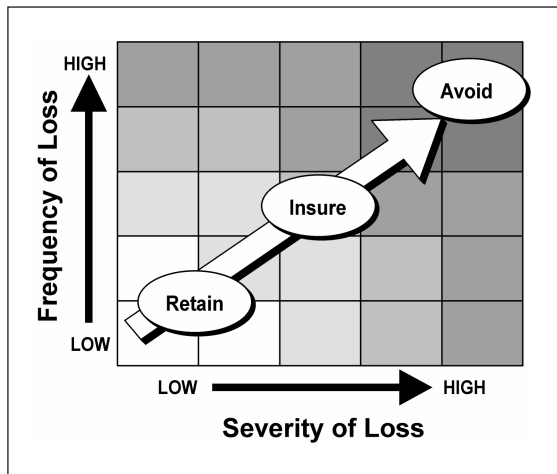


Figure 2-15
When to Insure

successful manner, as well as allocate and control resources to achieve the event objectives.

The professional event coordinator must create realistic time lines and production schedules that incorporate the interdependencies and critical path of activities, as well as manage the risks associated with them. These schedules must be validated and verified by the event stakeholders and then distributed to all appropriate personnel and providers. Timely and efficient communications are critical to the successful achievement of the event goals and objectives.

The professional event coordinator also performs risk assessment and analysis to identify problem areas, evaluate available options, and create contingency plans that will mitigate the consequences should an incident occur. These contingency plans should include the triggers to indicate implementation, the actions to be taken if implemented, and the individuals who will be responsible, as well as the procurement of the appropriate insurance coverage.

EXERCISES IN PROFESSIONAL EVENT COORDINATION

Determine the event elements and create a time line and production schedule for each of the following events. Be sure to include the research, design, planning, implementation, and evaluation phases.

1. Your professional association will be holding its annual convention in your city two years from now. It will consist of four days, including 36 concurrent seminars, a trade show, a welcome reception, an awards banquet, and three days of leadership meetings before the convention begins.
2. Your Convention and Visitors Bureau wants to hold a three-day Familiarization Tour for 50 meeting planners in conjunction with your city's famous cultural heritage festival six months from now. The tour should include a visit to the festival, site visits to ten hotel properties and attractions, and meal functions at at least six other hotel or resort properties.
3. The city elections took place yesterday, and the newly elected mayor just called and wants to hold an impressive investiture ceremony and inaugural ball six weeks from now. The ceremony will be in the afternoon and the inaugural ball that evening, and both are to include elements that recall the campaign issues of supporting youth programs, strong law enforcement, and community pride.

Facing Page

Events often take place in unusual and exciting locations, such as this natural history museum. *Photograph by Mike Rudahl, courtesy of Expo Events, Inc.*