

Event Management
Toolkit

Operations Manual Template

**[Your Event]**

**EVENT STRATEGY &**

**OPERATIONS MANUAL**

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Date:

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# SECTION 1 - EVENT STRATEGY

# 1.0 EVENT OVERVIEW

## 1.1 Event Background and Details

###  EVENT BACKGROUND

[History, purpose. location and format of the event in detail]

### EVENT DETAILS

**Company:**

**Date(s) of Event:**

**Tourism Season: [**Peak, shoulder or low tourism season]

**Location of Event:**

**Head Office:**

**Managing Directors:**  [Names and contact information]

## 1.2 Vision and Mission

### VISION

[Where the event will be in e.g. five years’ time]

### MISSION

[How the event will reach its vision.]

## 1.3 Values

The primary values which underpin the decisions made by event organisers are:

## 1.4 Goals and Objectives

The following table outlines the goals and objectives of [this year’s event], along with a list of the strategies which will be used to achieve the KPIs and their measures of success.

[Examples below – go through and adjust these for your event and add other goals and KPI’s]

|  |
| --- |
| **[Your Event]** |
| **GOAL** | **KEY PERFORMANCE INDICATORS** | **STRATEGY/ACTIVITIES** | **MEASURE OF SUCCESS** |
| Develop partnerships with key stakeholders in the local/regional area and the tourism industry  | Secure the support of:* Council
* Regional Tourism Organisation
* Business Chamber
* State Tourism Organisation

Gain support from the broader local community. | * Have an initial face to face meeting to present the concept and talk about how we can work together i.e. cross-promotion, sharing suppliers, sharing resources including photos/video content, collaborative marketing, other
* Issue an invitation to the media launch
* Provide monthly updates to all stakeholders
* Consider issuing 1-2 complimentary passes so each party can attend the event
* Host several public events to gain community support i.e. youth events, street-art activation, other
 | Letter of supportCollaborative marketing and PR activities Participation in the eventIn-kind supportPartnership agreementsParticipation in the event |
| Generate significant inter-state, intra-state and international visitation to local region. | Attract x# day-trip visitors and x# overnight visitors to the inaugural event; x% of which normally reside outside the local region | * Implement the marketing and PR plan – heavily promote event/accommodation packages
* Promote region as a fantastic holiday destination for all target markets
* Secure discounted domestic and/or international flights with an airline
* Release 2-3 rounds of tickets
* Continually monitor sales
* Review the progress at monthly budget meetings and take action as requireD
 | Ticketing and booking system sales and data (postcode analysis) |
| Develop a high-quality visitor experience for all attendees | Achieve an overall visitor satisfaction rating of 75% or more  | * Monitor all communication channels closely
* Respond to all enquiries within 48 hours
* Empower staff to take action as required
* Record all feedback and include it in the post-event review and analysis
 | Visitor survey |
| **FINANCIAL GOALS** |
| Generate the income required to run the inaugural event | Income target $x | * Develop a comprehensive budget which outlines all existing and potential revenue streams
* Ensure sufficient plans are in place to achieve all income targets
* Ensure no unnecessary expenses are made in the lead up to the event
* Review the progress at monthly budget meetings and take action as required
 | Event budget |
| Secure the cash sponsorship required to run the inaugural event  | Cash sponsorship target $x All agreements should be signed prior to [date] | * Develop a list of suitable major and local partners
* Develop pitch documents
* Secure face to face meetings
* Negotiate all desirables
* Clarify expectations
* Sign contracts
* Create new and build existing partnerships
* Deliver on all obligations
* Relationship management
 | Event budget  |
| Ensure that the majority of event tickets are sold prior to the event  | Sell a minimum of 90% or x# event tickets prior to [date] | * Implement the marketing and PR plan
* Release 2-3 rounds of tickets
* Continually monitor sales
* Review the progress at monthly budget meetings and take action as required
 | Ticketing system  |
| **OPERATIONAL GOALS** |
| Source a reliable pool of volunteers who can help service the event | Secure x# volunteers to fill all volunteer positions  | * Appoint a Volunteer Coordinator to recruit skilled volunteers to complete set tasks in the lead up to, at and post event. Compile the contacts in a database
* Provide adequate training and supervision
* Develop a volunteer roster
* Seek feedback post-event
 | Volunteer register  |
| **COMPETITION GOALS** |
| Generate significant interest from both international and domestic competitors to attend the event | Generate x# competitor expressions of interest  | * Implement the marketing and PR plan, which will include a launch event/media call, Save The Date campaign, direct marketing to various teams, invitation to compete, etc.
* Cross-promote the event with other regional sports events
* Ensure there is an attractive prize pool on offer
* Package the competition with accommodation and experiences as well as discounted flights
* Gain the support of the industry and ask them to promote the event in their networks
* Promote the region as a fantastic holiday destination for all target markets
 | Competitor registrations |
| **ENVIRONMENTAL GOALS** |
| Strive to be a climate-neutral and climate-friendly event | Minimise the event footprint by implementing environmentally-sound practices, educating competitors/performers and consumers | * Develop a Corporate Social Responsibility strategy
* Compose a checklist of recommendations for the day-to-day running of an event
* Communicate key messages to all attendees and involve them in the process
 | A positive legacy |
| Make/generate a significant financial contribution to an environmental charity | Generate a minimum $x contribution to [charity name] | * Donate a percentage of each event/accommodation package sold to the charity
* Increase awareness amongst event patrons by encouraging them to take part in a tour of the charity during the event
* Ask those who participate in the tour to make a donation to the charity
* Increase awareness amongst competitors by inviting the charity staff to make a presentation to them pre-event
 | Accommodation bookingsDonation records |
| **MARKETING & PR GOALS** |
| These goals will be derived from the marketing plan | - | - | - |

## 1.5 Core Activities

[Your Event] willbe made up of the following core activities/events:

**a)**

**b)**

**c)**

## 1.6 Strengths, Weaknesses, Opportunities and Threats (SWOT) Analysis

|  |  |
| --- | --- |
| **STRENGTHS** | **WEAKNESSES** |
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| **OPPORTUNITIES** | **THREATS** |
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##

## 1.7 Competitor Analysis

[Consider events in your region and similar events out of region]

|  |  |  |  |
| --- | --- | --- | --- |
| **EVENT DETAILS** | **STRENGTHS (3)** | **WEAKNESSES (3)** | **POINT OF DIFFERENCE (3)** |
| [Name of Event] | *
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| [Name of Event] | *
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| [Name of Event] | *
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| [Name of Event] | *
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*
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# 2.0 EVENT STRUCTURE

## 2.1 Structure

The event structure will be a [your incorporated structure].

The registered event/business name is [your registered name].

  The Executive Committee include:

* +

An advisory board of local stakeholders includes:

* +

## 2.2 Roles and Responsibilities

The following table summarises the overarching roles and responsibilities of key staff and contractors.

|  |  |
| --- | --- |
| **RESOURCE** | **ROLE/RESPONSIBILITY** |
| Executive Committee | Event Management including but not limited to:* Company structure and governance
* Licensing and approvals
* Risk management
* Financial management
* Local sponsorship pitching
* Sponsorship management
* Ongoing project management
* All aspects of the competition
* Safety Officer
* Industry and stakeholder liaison
* Venue liaison
* Media liaison
* Event ticketing
* Talent, entertainment and programming
* Merchandising
* Logistics and event operations including the field trip, event security, other
* Volunteer management
* Event bump-in and out
* Administration
* Evaluation and reporting
 |

|  |  |
| --- | --- |
| **RESOURCE** | **ROLE/RESPONSIBILITY** |
| [Staff member name + position] | * [responsibility]
* [responsibility]
* [responsibility]
 |
| [Staff member name + position] | * [responsibility]
* [responsibility]
 |
| [Staff member name + position] | * [responsibility]
* [responsibility]
 |

## 2.3 Partners and Stakeholders

Organisers have identified the following partners and stakeholders, who will play a key role in delivering the event.

### EVENT PARTNERS

The following businesses/organisations will play a major role in the annual event:

* Event Committee
* Council
* RTO

### STAKEHOLDERS

A commitment from the following businesses/organisations will assist event organisers to deliver the event:

* Sponsors
* STO
* Local tour operators

## 2.4 Volunteer Management

A Volunteer Coordinator will be appointed to oversee volunteer recruitment and retention, rostering, supervision, communications, induction, training, policies and procedures i.e. Code of Conduct, Safety Management System, Workplace Health and Safety for the event.

Event volunteers will be required to assist with a series of duties in the lead-up to, during and post event in some of the following roles:

* Visitor Information Services
* Event Support
* Administration
* Bump-in and out
* Merchandise Sales
* Social Media
* Event Ticketing
* Logistics and Event Operations
* Other

The following organisations, community groups, educational institutes, and others may be able to resource the event in some capacity:

* Local service clubs
* Local University students
* Local TAFE trainees

# 3.0 SUSTAINABILTY

## 3.1 Finance

A diverse range of revenue streams have been identified for the event. These include:

[Examples – adjust for your event]

* Competitor registration packages
* General admission fees (single day or weekend passes incl. transfers)
* Event and accommodation packages (various)
* Council grants and funding
* Corporate sponsorship
* Commission from tour bookings
* Official merchandise e.g. caps and t-shirts
* Commission from food and beverage stallholders
* Advertising (print/digital)
* Trade sites fees
* STO event funding support

## 3.2 Environment and Conservation

[Detail the event’s environmental approach]

# 4.0 BRANDING

## 4.1 Branding Strategy

The branding for the event will be developed and managed by [company name].

# SECTION 2 - OPERATIONS MANUAL

The following plans apply to the [year] [Your Event].

# 5.0 EVENT TIMELINE OVERVIEW

[Update the below for your event, based on your detailed event planning timeline]

|  |  |
| --- | --- |
| **MONTH** | **MILESTONES** |
| 13 months prior  | Planning meeting |
| 12 months prior | Sponsorship pitches |
| Licenses and approvals secured |
| Major sponsor/s secured |
| 11 months prior  | Event/media launch |
| Save The Date campaign commences |
| Local sponsorship secured |
| 8 months prior  | Invite performers, stallholders |
| Develop accommodation and event packages with local tour operators and airlines |
| Marketing begins |
| 6 months prior | Tickets on sale |
| 5 months prior | Merchandise planned |
|  | All sponsorship monies due |

|  |  |
| --- | --- |
| **MONTH** | **MILESTONES** |
| 3 months prior | Call for volunteers |
| 2 months prior | Update the risk management plan |
|  | Determine the dates for the next event |
| Final push for day-trips and weekend trips  |
| Event month | Bump-in |
| EVENT |
| Bump-out |
| 1 month post-event | Review and evaluation |
| Planning meeting |

# 6.0 FINANCE

## 6.1 Budget

A comprehensive event budget has been developed for the [year] [Your Event].

Please see Appendix, *[Your Event] [year] Budget* for details.

## 6.2 Sponsorship

The following table outlines a number of potential sponsors who could benefit from aligning their product/service with the event.

|  |  |  |
| --- | --- | --- |
| **Partners / Major Sponsors** | Council RTO |  |
| **Sponsors - Industry** |  |  |
| **Sponsors - National** |  |  |
| **Sponsors - Local** |  |  |
| **Accommodation Partners** |  |  |
| **Media Partners** | Local and regional radio and television broadcasters |  |

### SPONSORSHIP OPPORTUNITIES

A pitch document and various proposals will be developed for presentation to potential major sponsors. Following is an overview of the generic sponsorship opportunities associated with the event:

* Platinum (naming rights) $x
* Gold Sponsor $x
* Silver $x (x#)
* Bronze $x (x#)
* Local Business Partner $x (x#)
* Local Business Sponsor $x (x#)
* Other

## 6.3 Grants and Funding

### LOCAL GOVERNMENT

[Outline the details of any local community grants programs, noting their due date, funding period, eligibility criteria]

### STATE GOVERNMENT TOURISM FUNDING

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **GRANT/FUNDING** |  **DETAILS**  | **CRITERIA** | **FUNDS AVAILABLE** | **DEADLINE** |
|   |  |  |  |  |

### OTHER GOVERNMENT FUNDING PROGRAMS

[Outline the details of any other Government grants programs e.g. Festivals Australia, Arts, Innovation, noting their due date, funding period, eligibility criteria]

# 7.0 VENUE AND LOGISTICS

## 7.1 Venue and Site Plan

**[NAME OF LOCATION}**

[Details of location, including access, accommodation, parking, etc.]

Attach a site map to this plan if you have one.

## 7.2 Emergency Access

[Details]

## 7.3 Insurance

[List the details of all insurance policies, including type of insurance, insured amount and insurance company name and policy number]

[Example] The event will be insured under [Name], who have taken out Public Liability Insurance to the value of $20,000,000.

# 8.0 PROGRAM

The following program has been prepared for the [year] event. This program and its contents are subject to change at the organisers’ discretion.

|  |  |  |
| --- | --- | --- |
| **TIME (subject to change)** | **EVENT/ACTIVITY** | **VENUE** |
| **Day 1: (date) – [Main Event]**  |
| 06:00 – 07:00 |  |  |
| 07:00 – 16:00 |  |  |
|  |  |  |
| **Day 2: (date) –** **[Main Event]** |
| 07:00 – 08:30 |  |  |
| 10:00 – 12:00 |  |  |
| 12:00 – 13:00 |  |  |
| 13:30 – 14:40 |  |  |
| 13:30 – 18:00 |  |  |
| **TIME (subject to change)** | **EVENT/ACTIVITY** | **VENUE** |

|  |
| --- |
| **Day 3: (date) – [Main Event]** |
| 07:30 – 08:30 |  |  |
| 09:00 – 10:00 |  |  |
| 11:30 – 13:30 |  |  |
| 14:00 – 15:30 |  |
| 16:00 – 18:00 |  |  |
| **Day 4: (date) – [Main Event]**  |
| 18:00 – 22:00 |  |  |

# 9.0 MARKETING

9.1 Target Market
  [Detail target market demographics, geographics and psychographics]

## 9.2 Unique Selling Proposition (USP)

[Your Event’s USP]

## 9.3 Key Marketing Messages and Channels

[Summarise the key marketing messages and marketing channels used for the event – refer to your marketing plan]

# 10.0 RISK MANAGEMENT

## 10.1 Risk Register

[Detail Risk Management Plan]

## 10.2 Safety and Medical Assistance

[Detail Safety and Medical Response Plan]

## 11.0 REVIEW AND EVALUATION

[Based on the information below, insert how you will review and evaluate your event each year]

To determine the success of any event, **SMART** (specific, measurable, achievable, relevant, time-bound) **objectives** must be established in advance. These objectives should be reviewed within the 3-4 weeks after the event. *Did you attract the numbers of people you had anticipated? Did you attract the market you intended? Did you reach your sponsorship target? Did you achieve the amount of media publicity you wanted?*

Valuable feedback should also be obtained through **face to face or electronic surveys**. SurveyMonkey is a free and professional tool which is easy to set up and use. The link to the survey should be circulated to patrons via email or social media within 24 hours of the event ending. The link to tailored surveys for participants should be circulated via email within two business days. All surveys should be accessible for a minimum of two weeks after which the results should be collated and analysed.

It is crucial that the event hosts both **stakeholder and internal debriefs** within 2-3 weeks of the event’s ending. These (separate) meetings should involve event staff, committee members, and all coordinators, volunteers, talent, venue managers, sponsors, contractors and suppliers (and any other relevant stakeholders such as security, emergency services, etc.). The meetings should be scheduled in advance so people have them in their diaries. An agenda should also be circulated at least one week prior to the meeting. All participants should come prepared with their key outtakes and be encouraged to contribute open and honest feedback (which is of a constructive nature).

Other methods that may assist with this process include:

* Observation and informal conversations throughout the event
* Benchmarking the event against similar events
* Setting up a media monitor to record the event’s equivalent advertising value (AVE)

All findings and recommendations should be compiled into a **Review and Evaluation Report** and circulated to all necessary stakeholders within two months of the event. The recommendations should be considered at the first planning meeting for the next event and implemented to enhance the overall success of the event.