



Special Events and Festivals

How to Plan, Organize
and Implement

Angie Prosser and Ashli Rutledge

Special Events and Festivals: How to Plan, Organize, and Implement

Special Events and Festivals: How to Plan, Organize, and Implement

by Angie Prosser and Ashli Rutledge



Venture Publishing, Inc.
State College, PA

Copyright © 2003



Venture Publishing, Inc.
1999 Cato Avenue
State College, PA 16801
Phone(814) 234-4561
Fax(814) 234-1651

No part of the material protected by this copyright notice may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage and retrieval system, without written permission from the copyright owner.

Trademarks: All brand names and product names used in this book are trademarks, registered trademarks, or trade names of their respective holders.

Production Manager: Richard Yocum
Manuscript Editing: Valerie Paukovits, Michele L. Barbin
Cover by Echelon Design
Cover photo by Getty Images

Library of Congress Catalogue Card Number 2002116440
ISBN 1-892132-40-0

Acknowledgments

We would like to acknowledge the many organizations whose events, ideas, and successes have inspired the creation of *Special Events and Festivals: How to Plan, Organize, and Implement*. Special gratitude is extended to the City of Greenville, South Carolina for recognizing the importance of special events and for providing the resources for the hundreds of events that take place each year while entertaining, educating, and helping to fulfill the lives of the event participants. We would also like to acknowledge Pam Davis for her time and support while editing the manuscript.

Thanks from Angie...

I would like to thank the Parks, Recreation, and Tourism Management Department of Clemson University—specifically Dr. G. Wesley Burnett, Dr. Francis McGuire, Dr. Bonnie Stevens, and Dr. JoAnn Zimmerman—for their time, guidance, and direction that made this book a possibility. Likewise, I would like to acknowledge the many individuals, including numerous special events staff and event committee members, who have helped to shape my life and career over the years with their encouragement, guidance, assistance, and friendship. Special recognition to Julie Zapoli and Jan Cox for their friendship and support during the long hours while this book was in progress. And finally, a special thanks to Judith Alexander, for giving me tons of encouragement and for being a constant source of positive energy and motivation.

Thanks from Ashli...

I would like to thank Keri Hall, Cindy Nelson, and the rest of the Freedom Weekend Aloft family, who gave me the first glimpse of the event business. Also, I'd like to give special recognition to my son Ivan, for being my strength and without knowing giving me courage. Additional acknowledgment goes to my family for their constant support, for believing in me, and for helping me to achieve my dreams. Thanks to Angie, for giving me the opportunity of a lifetime, and in the meantime, some great advice. And finally, my appreciation to those who have given me the opportunity to learn the business of planning special events.

Table of Contents

<i>Acknowledgments</i>	v	<i>Chapter 7: Sponsorships</i>	51
<i>List of Appendices</i>	ix	Sponsorship Opportunities	
<i>Chapter 1: So You Want To Plan a Special Event?</i>	1	Types of Sponsors	
Event Vision		Identifying Potential Sponsors	
Special Events Planning Steps		Sponsorship Proposal	
Using This Manual		Sponsor Sales Meeting	
<i>Chapter 2: Event Design</i>	3	Sponsor Fulfillment	
Determine the Goal and Need for the Event		Post-Event	
Define the Event		<i>Chapter 8: Risk Management</i>	59
Select Event Name		Developing a Comprehensive Risk Management Plan	
Determine the Theme		Risk Analysis	
Define the Target Audience		Event Safety and Security	
Set Date and Time		Command Center	
Select the Location		Vehicle and Pedestrian Control	
<i>Chapter 3: Organization Structure</i>	7	Nonsworn Security	
Management Group		Health and Food Service	
Steering Committee		Event Liability	
Volunteer Program		General Liability	
Volunteer Recruitment		Liquor Liability	
Volunteer Orientation, Training, and Supervision		Americans With Disabilities Act	
Volunteer Recognition and Retention		Crisis Management	
Volunteer Evaluation		Obtain Appropriate Permits	
<i>Chapter 4: Event Development</i>	19	Select Vendors	
Operations Manual		<i>Chapter 9: Operation Plan</i>	63
Policy Guide		Entertainment	
Create the Working Plan		Booking Performers	
Checklist		Music Licensing	
Event Timeline		Determine Site Needs	
To-Do List		Site Walk-Through	
Generate a Build-Out Schedule		Site Layout: Mapping the Site	
<i>Chapter 5: Finance</i>	31	Parking	
Establish a Budget		Electrical	
Expenses		Communications	
Revenue		Sanitation	
Cash-handling Procedures		Signage	
Vendor Ticket Weigh-In and Reconciliation		Event Headquarters	
<i>Chapter 6: Marketing and Media Strategies</i>	43	Event Evaluation	
Marketing		<i>Chapter 10: Event Ideas</i> —Special Events and	
Marketing Plan		Community Celebrations	73
Creating an Image/Brand		A Day in the Park	
Collateral/Marketing Items		Arts Alive	
Media Partnerships		Cultural, Ethnic, and Heritage	
Promotions		Destination Downtown	
Publicity		Everyone Loves a Parade	
Public Service Announcements		Fiesta!	
Advertising		Kids' Korner	
Evaluating the Marketing Plan		Learning Made Fun	
		Music Series and Concerts	
		Tiny Tots	

<i>Chapter 11: Event Ideas</i> —Holiday Celebrations	97
Luck o’ the Irish	
Here Comes Peter Cottontail	
Summertime Fun	
Goblins, Ghosts, and Witches	
Gobble, Gobble, Gobble	
Sights and Sounds of Christmas	
<i>References and Resources</i>	103
<i>About the Authors</i>	104

List of Appendices

Appendix 3.1	Christmas Parade Committee Responsibilities	11
Appendix 3.2	Festival Committee Responsibilities	12
Appendix 3.3	Event Job Positions for Volunteers	14
Appendix 3.4	Volunteer Application	15
Appendix 3.5	Alive After Five Volunteer Guidelines	16
Appendix 3.6	Volunteer Acknowledgment and Release of Liability	18
Appendix 4.1	Special Events Checklist	21
Appendix 4.2	Neighborhood Association Plan of Action	23
Appendix 4.3	Event Timeline	25
Appendix 4.4	To-Do List (Road Race Example)	26
Appendix 4.5	Build-Out Schedule (Taste of the Town Example)	29
Appendix 5.1	Event Operating Budget	35
Appendix 5.2	Christmas Parade Expense Report	38
Appendix 5.3	Cash and Ticket Procedures	39
Appendix 5.4	Ticket Weigh-In and Reconciliation Policy	41
Appendix 6.1	Radio Station Sponsorship Agreement	47
Appendix 6.2	Media Release	50
Appendix 7.1	Sponsorship Proposals for Weekly Concert Series (Alive After Five)	55
Appendix 9.1	Food Vendor Application	67
Appendix 9.2	Performance Contract for Weekly Concert Series	70
Appendix 9.3	Vendor Electrical Needs	71
Appendix 10.1	Bartenders' Mix-Off Rules and Procedures	85
Appendix 10.2	Annual Chili Cook-Off Rules and Regulations	86
Appendix 10.3	Annual Chili Cook-Off Registration Form	90
Appendix 10.4	Annual Chili Cook-Off Official Judging Sheet	91
Appendix 10.5	Ice Carving Competition Rules and Regulations	92
Appendix 10.6	Jalapeno Eating Contest Rules and Regulations	93
Appendix 10.7	Food Festival Restaurant Pentathlon Rules and Procedures	94
Appendix 10.8	People's Choice Award Ballot	95

Chapter 1

So You Want To Plan a Special Event?

Special events and festivals have become common but important features in communities all over the world. They are some of the fastest growing types of leisure and tourism related businesses. Getz (1991) defines a special event as “an affair, effect, happening, notable occurrence. A onetime or infrequently occurring activity outside the normal program of the sponsoring or organizing body” (p. 44). Special events have the ability to satisfy the need for an opportunity for participation in public celebration, leisure activities, and social and cultural experiences outside the normal range of choices or beyond everyday experiences (Getz, 1991).

Events are recognized and often used as important attractions within the tourism industry and as an expression of a community and its culture (Hinch & Delemere, 1993; Mayfield & Crompton, 1995). Ranging from community concerts to multiday festivals, elected officials and municipal managers increasingly view events as attractions, economic stimulations, and part of the cultural process and social organization within the community (Getz & Frisby, 1988).

Festivals have been a part of human history since there was cause to celebrate. Today, these special events may have strayed from their founding roots, whether spiritual, symbolic, cultural or environmental, but these occasions are nevertheless very worthwhile recreation opportunities, rewarding both to individuals and to the communities that host such events. (Robinson & Noel, 1991, p. 79)

Special events provide an element to the quality of life vital to the success of our communities (Delemere & Hinch, 1994). Events provide the opportunity for people from all walks of life to participate and to share experiences in a fun and healthy environment. Events create memories, offer families a place to spend leisure time together, provide opportunities to meet new friends, increase tourism, generate interest in the environment, and make people happy. Special events have the ability to satisfy the need to participate in public celebrations, leisure activities, and social and cultural experiences beyond everyday experiences. Events bring citizens together, giving them an opportunity to meet other people and create a sense of excitement for community members (Getz, 1991).

Festival planners and many local governments often perceive festivals as a vital contributor to local economic development and therefore frequently strive to lure as many visitors to the area as possible. Planning special

events can promote permanent development in the area, thus creating a sense of central place. Matched with restaurants, entertainment centers, hotels, and conference centers, special events draw people to specific areas within a community. The creation of cultural and entertainment venues leads to new interest and vitality in the community, which in turn leads to an increased sense of pride and enhanced quality of life (Paumier, 1988).

Event Vision

The success to any thriving event starts with a vision. This vision is not just a desire, but the ultimate target for which all efforts are directed. The vision not only serves as a catalyst to establish a consensus among members of the governing board, but also defines the event’s creative and financial future. The most important responsibility for the event planner is to transform the vision into a reality. The first part of the process is gathering comprehensive data needed during the formation and organization of the plan. There is a logical progression of gathering material needed to begin the planning process. Determine (1) the governing body responsible for the event, (2) the financial resources available, and (3) the time needed to accomplish the vision.

After the decision has been made to have an event, the governing body should follow a specific process to create the event. The key to any successful event is thorough planning. Whether the planner has numerous years of experience and is looking for new ideas or is someone assigned to plan an event for the very first time, deliberate attention should be placed on adhering to (or at the very least, noting) each planning step. Recommendations for special event planning steps follow.

Special Events Planning Steps

The key to proper planning is detailed organization. All events should go through the same planning steps whether the event is a first-time event or celebrating its 20th anniversary. Often events fail because an idea was created and the planning process was rushed or not followed completely. The more thought-out the content, process, marketing strategies, and financial goals, the better the chance of having a successful event will be. These steps are to be used as a guideline and do not necessarily work on a continuum. By the nature of the organization hosting the event or distinctive personality

of the planning body, certain steps may occur before others. It is important to consider each step while not neglecting steps that may seem obvious or too cumbersome. A brief overview of the planning steps follows, which then will be illustrated in the ensuing chapters.

1. Design the event—name, location, and theme
2. Establish the organization structure
3. Develop the event—create the operations manual, policy guide, and working plan
4. Establish a budget
5. Develop marketing and media plans
6. Set strategy for sponsorships
7. Develop a risk management plan
8. Implement the operational plan
9. Execute the event
10. Wrap-up and evaluate the event

Using This Manual

This book is designed for event planners by providing information and resources to assist them when planning new events as well as established events. The event industry has become a profession. Events don't just happen—they are carefully thought-out plans requiring diligent focus and demanding work. This book serves as a resource, not the ultimate authority. The event ideas and planning methods are from years of experience in the event planning profession. No single method or explanation exists for event planners. Each planning organization faces its own unique characteristics and personalities. This manual is designed as a guide to help in the process and to identify ideas that may have not been considered or simply overlooked. It is meant to be used to plant seeds of ideas in one's already creative mind to be carried out in each individual process.

Whether one is a seasoned event planner, a new staff member in an event management company, or a board member for a nonprofit organization, this manual has been written to assist anyone with the responsibility of planning a special event or festival. Each special event will differ from community to community or even from year to year depending on the planning team. The planning steps presented in this manual are applicable to all types of events from large, multiday festivals to a small one-day community activity. There is no single planning method to follow—each community is unique in the organization, its resources, and its limitations. The methods and ideas presented in this manual intend to acquaint and inspire event planners as well as to help planners recognize the steps necessary to produce successful special events.

The chapters are presented chronologically, following the planning process of event production. With knowledge and experience, planners will learn when and how to combine steps, eliminate procedures, and manipulate the planning process to best meet the needs for individual events.

This manual provides many prototypes and planning tools, which serve as examples to be used, adapted, and rewritten. Every planner needs to adopt methods and tools that best meet his or her own personal habits and planning situations. We intend the text to be used as a resource and idea stimulus to help start the process, to identify who to get involved, and how to make great events happen.