

# The Event Planner's Guide

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## Why have Events?

Developing events, especially those which have the potential to become regionally and nationally significant, can have many benefits. They can help to raise awareness of a place, or an issue, and can bring about a positive impact on the local economy.

For example, events can:

- Create jobs and income for the local area;
- Raise the profile of the area at regional, national and international level;
- Bring local people together, whether as participants or spectators;
- Promote healthy living through sports and physical activity;
- Create access to local culture, for example heritage, nature, art or sports; or
- Provide opportunities for local and national charities to raise funds.

This toolkit is a practical resource for anyone who is planning to organise an event. It provides information, standards and guidelines and helps to break it all down in order to plan, design and run your event successfully.

### **This toolkit includes:**

- Things to think about at each step of developing your event;
- Top tips throughout each section;
- Guidance on processes and procedures;
- Guidelines in relation to current legislation; and
- Templates to help with your planning.

**Bridgend County Borough Council** can help at various stages in planning and managing your event. Specific departments are responsible for key activities relating to licensing, health and safety, highways, trading standards, marketing and promotion but your first point of contact will be with the **Tourism Team**, visit [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events) for more details.

## What is an Event?

An event is an activity that happens at a particular time and enables people to come together. They might come together in celebration, a shared love of music, sports challenges, community fundraising or purely for entertainment such as a circus night. There are a number of other reasons too, the first thing you will need to consider is why you are planning to hold your event.

Events can vary in a number of ways, for example, attendance might be free or you may need to buy tickets. It could be open to the public or by invitation only. Decisions like these depend on a huge range of factors but primarily they depend on what the event is hoping to achieve, in other words, what its objectives are.

For example, an event's objectives might be linked to making a profit so entry will be exclusive to ticket holders who will have paid a price to attend; or they could simply be linked to social or community benefits and so the event is open to anyone and free of charge.

How far in advance an event is planned usually depends on the scale of the event. Events that are promoted on an international scale, for example, will be years in their development but local events tend to be somewhere between six and twelve months. Make sure you have a realistic idea of how long you will need to plan for your event.

Whatever the scale of your event, to run it successfully requires thinking through each element beforehand and you will find plenty of tips and suggestions in this toolkit to help you along the way.

# Planning Your Event

## Step 1: Develop the Idea

Before you get started, it's a good idea to think about why you are planning to hold an event. This will influence many of your decisions further down the line so it's important to have a clear idea of your goals.

You could think about coming up with a vision, which would be your long term aim for the event. It's also a good idea to define some clear objectives. These are each of the things that you'd like this event to achieve.

Doing this at the beginning will help you to explain your event to others, for example potential funders, and will help to focus everyone involved.

### TOP TIP

If you're not sure how to define your objectives, think about using the SMART principle to create objectives that are:

- Specific
- Measurable
- Achievable
- Relevant
- Time-based

Once you know why you want to hold your event and what you'd like it to achieve, you can start to think about how realistic your goals are.

Some things to think about in the early days of planning your event might include:

- What support are you going to need from your team?
- What are your combined skills and strengths?
- Is there a gap in the market for this event to fill?

- Is there a demand for an event of this kind?
- Is there a chance the event would be duplicating an existing one?
- Are there resources available to deliver it?
- Will the event be financially viable?
- Is there likely to be support from the local community and other organisations?

One way of beginning to answer these questions is to create a SWOT Analysis. This is where you identify the strengths, weaknesses, opportunities and threats that could have an impact on your idea and the people and resources you have available to you. A template for a SWOT Analysis is available with this toolkit.

Even if your event has been running for some years, it can be useful to revisit your vision and objectives and look again at these questions to make sure you are achieving what you set out to do.

## Step 2: Form a Team

You may find that it will help to get your idea off the ground if you have an **events team** or a **committee**. It's a good idea to establish team roles and responsibilities. For large or complex events you may need both: the committee to steer the event planning on a more strategic level, and a more practical delivery team to make things happen.

You will need the right mix of skills and expertise and the right number of people. Having clear expectations and agreements set up in advance, and clear communication will help reduce problems later on.

Some typical roles and responsibilities within an events team include:

**Project management:** someone to act as the main point of contact and to have overall responsibility for the planning and running of the event.

**Treasury:** someone will need to take responsibility for managing the budget throughout the planning process, including the bank account, cash flow, invoices and payments to suppliers; and on the day, including cash handling and security.

**Marketing:** the event will need to be promoted in order to attract your target audience, and it's useful to have someone on board with some experience of this.

**Safety:** it is essential that safety is considered throughout your planning so that risk assessments can be taken and all safety and security measures put in place to ensure the safety of everyone at the event, including the public.

You may need people with specialist skills or knowledge; and you'll need enough people on board to cover the anticipated workload – both in planning the event and helping out on the day.

If you need to recruit paid members of staff, you will have legal responsibilities as an employer. Further information about employing people is provided on the UK government website – [www.gov.uk/browse/employing-people](http://www.gov.uk/browse/employing-people).

## **Volunteers**

It's likely that you will need to involve or delegate some activities to volunteers.

In selecting volunteers, think about what they are looking to get from being involved – they are giving up their time, so make sure this is recognised in some way. In the same way as paid members of staff, it's important to set out expectations at the start, including involvement in planning meetings; and agree working times and requirements.

## **Training**

Identify any training needs to make sure everyone in the team is competent and confident in performing their role.

Training could be formal or informal; group or individual. You can use your *Event Plan*, that you will develop later on, as a tool to help deliver training: making sure everyone involved in running the event has an understanding of the overall event; the safety plans and emergency procedures, sustainability plan, customer service and site or venue management. It's a good idea to keep training records, especially in health and safety training.

## **Becoming Constituted**

For particularly large events, you may need to set up an organisation or register a company, for example if you need to have a formal constitution in order to apply to certain funding organisations, or to contract with certain organisations.

The Bridgend Association for Voluntary Organisations (BAVO) supports and promotes voluntary organisations in Bridgend County Borough and has a wealth

[BridgendBites.com](http://BridgendBites.com)

of knowledge and experience in advising community groups to formalise their activities, visit [www.bavo.org.uk](http://www.bavo.org.uk).

The UK Government website can also help, visit [www.gov.uk/browse/business/setting-up](http://www.gov.uk/browse/business/setting-up).

## Step 3: Identify your Target Audience

Thinking ahead carefully about who you would like to attract to your event can have a big effect on the end result. What you offer at your event including the theme, programme, location and entry fee need to match up with the expectations of your audience so your target audience will influence many of your planning decisions.

Some of the things you might want to think about are:

- The age range you would like to attract, or life-stage;
- How far people might travel to your event (your catchment area);
- People's interests and popular trends;
- Sector or type e.g. families, businesses, locals or tourists;

Once you have an idea of the basic audience type you'd like to attract you can begin to develop a picture of your target audience, for example, how much they are likely to spend, how they will be likely to travel, what they will need once they are there, where they will be likely to see your advertising and much more.

Doing some simple research with your target group will help you to identify these things, whether there is a demand for your event and what you need to do to make it a success.

### TOP TIP

The first step in marketing your event is to know who you want to attract and make sure you offer what they want at the right price.

If you are looking to attract visitors and tourists to your event, Bridgend County Borough Council has undertaken some detailed research to identify the target market for the area, which is set out in the **Destination Management Plan**, contact the Tourism Team for more information.

An accurate estimate of attendance numbers is important as it affects the venue size, risk assessments and all aspects of the event's management on the day.

It can be difficult to estimate accurately, but things to take into account could be:

- Attendance numbers at similar events;
- What else is going on at the same time;
- The total population of your target audience (e.g. number of families in an area) and what percentage of those families you might expect to attend;
- The total target audience you are marketing your event to and what percentage are likely to come along;
- Known demand and interest.

Your venue might restrict your numbers, so you may want to think about ticketing or advance registration. This can be done online, and there is a range of online tools you can use, usually for a charge. Charging for entry is also useful if you need an additional source of income or are looking to make a profit from the event.

Once you have a better idea of the number of people coming, you will be able to plan the facilities and support you will need on the day, such as toilets, catering, stewards, and first aiders. Think about any special needs that people or groups may have, such as families with children, people with disabilities or elderly people.

#### TOP TIP

Plan ahead to collect some data at the event too, so that you are able to compare your target audience with your actual audience and, with all of that feedback, you will be in a much better position to run the event again in future. More information on this is available in the *Get Feedback and Evaluate* section of this guide.

## Step 4: Create an Event Plan

Now that you have a good idea of what your event will be and who is going to attend, you are now ready to start creating an event plan. This is the longest section of this guide and you can use the template within the toolkit to help you.

The event plan will be an extremely useful tool for you to update as you go along including everything you have agreed as a team and any changes or issues that come up as your event progresses.

In your event plan, you can agree dates and deadlines and who is responsible for everything.

Have regular meetings to progress and update the plan and keep everyone up to date, clear about expectations, timing, challenges and opportunities.

Your event plan can be used to help you secure any approvals, licenses and permissions you might need to host your event too.

You can send your plan to the Tourism Team if you would like some feedback or you would like any further advice.

### TOP TIP

An event plan helps other organisations, such as the local authority or your funders, to better understand your plans and how you are progressing.

Here are some things for you to think about when completing your event plan:

### Venue

The nature of your event will help inform the type of venue you select. We are fortunate in Bridgend County Borough to be able to offer a range of venues. The Venues section on [www.BridgendBites.com/events](http://www.BridgendBites.com/events) can help you to identify

somewhere that will work for you. Some of the issues to consider when looking at venues include:

- Location
- Budget
- Audience (venue capacity)
- Transport & parking
- Timing
- Permissions
- Restrictions
- Lay-out
- Availability

Once you've booked your venue, you can develop a site plan to show the layout. Prepare a sketch plan of the site, preferably to scale, showing the position of all the activities and attractions, circulation routes, access and exits. This drawing should be updated if your plans change and copies of the final version should be available at the event.

#### **TOP TIP**

If you're hiring a venue, you may need to extend the hire time to allow for setting up on the day or night before, and clearing up afterwards.

### **Stakeholders**

Other people may be affected by your event, for example, transport providers, local shops or local interest or amenity groups. Other stakeholders would include everyone who needs to be involved in the organisation of the event or informed about it, and this is normally dependent upon the size and nature of the event.

People such as neighbours and local businesses may be adversely affected by the event, for example by noise, parking, litter and extra traffic. It's a good idea to let people know what will be happening, and listen to what they have to say.

There may be easy ways to avoid problems, and if you have a good Event Plan you can reassure people you are taking their views on board and will address their issues.

Think about ways in which your event can benefit local people and businesses too and consider approaching them to see if they would like to be involved.

## Timing

The choice of date for your event can have a major impact on its success. Careful consideration should be given to the range of risk factors involved in selecting the best date, for example:

**Nature of the event:** is it an outdoor event; does it need to be staged in a particular season; does it have to be in a particular venue, such as a town location?

**Weather:** what are the probable weather conditions at your preferred time of year; will inclement weather affect the event; are there contingency opportunities available?

**Target audience:** who are you hoping to attract to the event: is this more achievable if it is staged at a particular time of the year or time of the week?

**Diary clashes:** what else is happening at the chosen location/venue; is the event diary overly busy? It's worth talking to the Tourism Team to check what else is planned in the area at the time. You should also check to see if your event clashes with any similar events further afield that may also attract your target audience or participants. A good place to start is the events diaries managed by Visit Wales and BridgendBites.com.

**Complementary activity:** are there any complementary events or activities taking place at the same time that could assist your event? Could you work together for mutual benefits?

**Resources:** are other major events taking place at the same time that will impact on the resources required to stage your event?

**Other Factors:** don't forget to check out any other influencing or relevant issues, for example, road or building works planned in the vicinity at the same time as your event.

Start organising the event well in advance so that you can carry out your risk assessments and obtain specialist advice if necessary. The statutory agencies (Police, Fire, Ambulance, Local Authority and voluntary agencies) will also need to have time to fit your event into their programmes, especially during the summer months when many events take place.

You may also be in competition with other events for facility hire such as marquees and 'portaloos', so the sooner you book your requirements the sooner you can start planning the details.

Nothing can be guaranteed, and you should always have a contingency plan to cover uncertainties such as weather or transport disruptions.

## **Legal Issues**

Organising an event involves taking care of a variety of legal and licensing issues. Bridgend County Borough Council is responsible for dealing with licensing for different activities:

- Performing live music
- Recorded Music
- Dancing
- Performance of a play
- Exhibition or a film
- Indoor sporting events
- Retail sale and supply of alcohol
- Boxing or wrestling events
- Supplying hot food or drink after 11pm until 5am

Applicants for licences under the Licensing Act 2005 should contact Bridgend County Borough Council's Licensing department at an early stage for advice and to answer any queries that come up, as the Act is undergoing a number of changes.

Here are some of the basics in relation to licensing, but make sure you check with the relevant department for the most up-to-date information:

- If you wish to sell alcohol or provide regulated entertainment at your event and the event is likely to attract **less than 500 people** you will need to complete a Temporary Events Notice at a small fee.
- If your event will attract **500 people or more** then you will require a full Premises Licence. The cost of a licence depends on the rateable value of the site. There is a sliding scale of fees for large scale events.

Under the Licensing Act 2003, Regulated Entertainment is defined as any entertainment that is provided to members of the public, or a section of the public, or with a view of making a profit. This definition is likely to change and you are advised to contact the Licensing Team to discuss what type of activities you wish to stage.

The descriptions of entertainment are as follows:

- Performance of a Play - A performance by way of speech, singing or action. This includes mime, puppet theatre, theatrical reading, etc;
- An Exhibition of a Film - The exhibition of any moving picture, not including promotional or educational films or live broadcasts;
- An Indoor Sporting Event - Any sporting event which takes place inside a building and the spectators are accommodated inside that building;
- Boxing or Wrestling Entertainment - Any contest, exhibition or display of boxing and wrestling;
- Performance of Live Music and/or the Playing of Recorded Music - Includes vocal or instrumental music or any combination of the two; or
- Performance of Dance - Any performance of dance by way of routine or entertainment. This includes majorettes, belly dancers or stage dancers, it does not include people dancing along to music.

Bridgend County Borough Council offers one to one advice sessions to help you complete your application form.

Please note that the licensing process can take up to two months to complete and will involve consultation with agencies and the public.

#### Top Tip

For larger scale events it is advisable to get in touch as early as possible to discuss your licensing requirements plus enquiries in relation to street trading and charity collections.

## Safety Plans

Organisers have a legal responsibility for the health & safety of staff, helpers and the public whatever the size of the event. All events must comply with recognised safety standards. Legally you **must carry out a risk assessment** to identify possible hazards, check the risks and decide how you will minimise those risks. You then need a written record of how you will put your plans into action and this forms part of your safety plan.

### a) Risk Assessment

To meet the legal requirements you must carry out a risk assessment to:

- Identify all possible hazards (anything that could cause harm to anyone or anything);
- Identify who or what might be harmed, and how;
- Evaluate the risks (the likelihood and impact of something happening as a result of the identified hazard); and
- Decide on the precautions that you will take to minimise the risks.
- Record your findings in writing and implement them

- Review the risk assessment to make sure that the precautions taken are working and update if necessary

Be sure to inform others working on the site or at the venue about your risk assessment and management plans to make sure everyone understands any risks and how to prevent incidents occurring. You could have it as a regular item on the agenda of your team meetings, so that it can be checked and updated on a regular basis to accommodate changes.

It's a good idea to re-visit your Risk Assessment on the day before your event begins to make sure it's still valid.

The Health and Safety Executive has put together some helpful information on the legal and safety implications of running an event. Visit [www.hse.gov.uk/event-safety/running.htm](http://www.hse.gov.uk/event-safety/running.htm) for further details.

## **b) Contingency Plan**

Think about what might go wrong on the day and plan ahead to deal with each potential situation. It does not need to be complicated: the shorter and simpler, the better. Set out in a clear statement:

- The action to be carried out if these emergencies happen
- Who is to take that action
- How you will let the right people know what is happening.
- At what stage during an incident control will be passed to the emergency services.

Some things to think about might include:

- |                                  |                            |
|----------------------------------|----------------------------|
| - Who's responsible              | - Fire fighting            |
| - Public / Community Safety      | - Staff safety             |
| - Barriers, staging & structures | - Food safety              |
| - Areas off-limits to the public | - Drinking water provision |

- First Aid/Illness
- After the event
- PAT tested electrical equipment
- Risk assessment and risk management
- Records, and keeping the risk assessment up-to-date as the event develops
- Security
- Accidents
- Overcrowding

### c) First Aid

Whatever the size of your event, it is essential you provide first aid facilities. Contract a professional first aid group such as the Red Cross or St John Ambulance. All first-aiders should be easily contactable during the event by radios or mobile phones.

Make sure the first aid tent at your event is well sign-posted. For summer events, some of the most common first aid issues will be from the hot, sunny weather – sun stroke, dehydration, sun burn, fainting, etc.

#### TOP TIP

The **Bridgend Events Safety Advisory Group (ESAG)** will support and advise event organisers on safety issues for any public events happening within the Bridgend County Borough area and you may be asked to come in and speak with them.

### Insurance

Organising the appropriate insurance for your event is essential. Aim to confirm your insurance around 2-3 months before the event and no later than a month

before. Check what is expected in terms of insurance by all funding partners and seek legal advice if you are still unsure.

When you have accepted a quote and received your policies, read them carefully, making sure nothing has been omitted that you thought you were covered for. If anything changes, you must tell your insurer immediately.

Your policy is likely to include a range of cover, for example:

**Public Liability:** to cover you in the event that your negligence as an event organiser causes death or injury or damage to a person's property. The amount of insurance that you should purchase will depend on the number of people that could be injured at one time by your activities and the potential seriousness of those injuries. It is recommended that you cover your event for a minimum of £2 million, but remember that in many instances a greater level of cover may be needed. If in doubt you should seek professional advice. If you don't have this cover any claim and the associated legal costs could be made against all the organisers and their private finances. If you use contractors, check that they also have their own public liability insurance.

**Employers Liability:** If you are an employer you will need Employers Liability Insurance unless you are exempt under the Employers Liability (Compulsory Insurance) Act. The minimum level of cover is £5,000,000 though most Insurers offer £10,000,000 as standard. The level of cover and premium will depend on the number of staff, payroll and duties.

**Event Equipment and Property Cover:** when you hire equipment for an event, it is likely that insurance is not included in the hire charge (always check with suppliers). Make sure that your insurer knows what use the equipment will be put to and where it will be kept.

**Cancellation & Abandonment Insurance:** this covers you for cancellation or abandonment of the event due to situations beyond your control.

## Equipment

The types of amenities your event will need depend on what sort of audience your event will attract. For example, an audience that includes older people may require extra chairs, one that includes young children will need a lost and found area, and all events need access for people with disabilities and wheelchair-friendly viewing points.

Before you contact suppliers for any equipment or services for your event, you should be familiar with the key details about the event, such as, date, time, venue and if possible, the programme. The supplier or service provider will then have a greater understanding of your event and will be able to provide realistic hire costs and some advice. They often have invaluable experience through years of supplying events.

If you are negotiating the cost of the service or equipment, know the price range in which you are prepared to negotiate. This will require you to make a few enquiries beforehand. If quoted a high fee that the supplier won't reduce, make sure you get the service promised, and therefore, value for money – for example, marquees set up and taken down for you as part of the cost.

Once you have reached an agreement, write a letter of confirmation setting out the conditions and outline all the tasks you are expecting – date, place and time of delivery and set up – and the method of payment. When you have a running sheet of the event, send it through to your supplier. Do not leave negotiations and agreements at a verbal level.

### **Don't forget...**

**Professional contractors:** Once you've identified what needs to be done you may need to take on contractors, such as electricians, waste contractors or marketing support. It helps to support the local economy if local businesses are recruited, and you will need to have a formal contract in place.

**Tents and Marquees:** Shelter from the weather is very important for outdoor events. Check if there are any consent requirements for erecting tents and marquees.

**Toilets:** Make sure you have enough toilet facilities at your venue or site, either within the building or outside. You may need to set up portable toilets to add to any existing facilities and they must be serviced during the event. You will also need to consider supplying a toilet with disabled access.

**Waste Management:** You need to manage the waste at your event. By reducing, reusing and recycling, event organisers can not only minimise the waste generated at events, but also enhance the image of their events.

**Technical Equipment and Services:** sound, lighting, stage and audio visual technical equipment can be hired from commercial hire companies. Professional and amateur performers will have specific sound, lighting and stage requirements. Find out what these are as they will have an impact on your budget and the way your event runs.

To make sure performers' needs are known and catered for:

- Create a technical requirements form for all acts to complete before the event, which you can then give to the technical contractor and stage manager. This is called a "Technical Rider".
- For bigger events hold a meeting with all your performers or a representative, stage manager and sound engineers. The technical contractor can then discuss with performers their particular needs before the event and identify any potential challenges.
- Develop a stage layout plan, showing where the sound equipment is located on stage.
- Have an accurate and detailed 'run-of-show' and provide a hard copy to all technical support staff.
- Appoint an experienced stage manager and stage hands.

The right public address systems, microphones, speakers, stage lighting, staging, screens, projectors and other technical equipment can make or break an event. Some have failed because the audience have not been able to clearly see or hear the main attraction.

This is an area where it generally pays to invest in a professional – for hiring the right equipment as well as providing expertise in setting it up and operating.

**Public Address (PA) System and Power Supply:** Discuss the needs of your event with your PA supplier. The easiest and safest way to take care of the PA is to hire a sound engineer to assemble and run the PA on the day. Provide a technical rider which details the event's requirements.

Most PA systems can be powered off a domestic power outlet, 15 amps. If you are running an average sized PA system and one or two extra lights, a domestic power supply will be adequate. However, your power requirements may be greater than this and you will need a 'three phase' power source to operate safely. Three phase outlets enable you to use industrial amounts of power. Check with your PA system supplier as to the type and amount of power required, and check with the venue as to whether three-phase power is available.

**You must use a registered electrician to make power connections at your event.**

**Communication:** If your event involves a number of activities and is spread out over a large area, you need to have some form of communication system so that event team members and helpers can get in touch with each other quickly and efficiently. Radio transmitter systems are available for hire or to buy.

**Tables and Seating:** Tables, chairs and other forms of seating, staging and risers can be hired. If you wish to provide tiered or terraced seating for spectator viewing, you can find it by searching for providers of scaffolding.

## Parking

Generally, parking restrictions will not be lifted to provide free parking for the public to attend your event – you need to make provisions for them. Think about:

- Approaching local schools, churches and halls;
- Using local parking buildings;
- Promoting park and ride options;
- Putting on a charter bus service;
- Parking for event employees, participants and volunteers; and
- Access to disabled parking.

If you are having difficulty securing parking for your event, contact Bridgend County Borough Council with the details of dates, numbers of vehicles involved and areas involved. They may be able to help you.

## Security and Crowd Control

Never underestimate the need for security, especially at large events where there are large numbers of people and if you are handling a lot of money. You may also need security while setting up equipment, staging or marquees, especially when these are left overnight before or after the event.

Security can also be necessary to provide the safe control of big crowds at an event. Different levels of crowd control will be required depending on the location, time and nature of your event. For example, if your event is in a public space you need a high level of security and crowd control to ensure public safety.

Hire a professional security company with a good reputation and record. Security companies can provide services for cash handling, bag checks, crowd control etc. Make sure you give clear instructions to your chosen company and that they understand your specific requirements. Be sure to tell the Police you are planning an event, this can be done via the Event Safety Advisory Group.

## **Signage**

Signage plays a crucial role in informing people about everything that is happening at your event, and where it is happening. Signage should be used at your event to indicate:

- Map of event including your information point.
- Toilets, first aid, lost and found (children and personal belongings).
- Rubbish and recycling bin locations.
- Entrances and exits, car parking, fire and emergency exits.
- Food stalls.

High quality signage that can be re-used for future events can be a good investment. You may require consent for signage used either at your event or to advertise your event.

## **Food and Beverages**

You may want to consider providing catering for spectators or participants in your event. You will need to allow space for the caterers/food stalls to come in to set up as well as room to operate. Ask any potential caterer about their food safety practices as you don't want your event ruined by poor food handling practices. You may also need to cater for your workers and performers. Try organising a deal with the catering vendors using meal tickets, and make sure you provide a separate area for the performers to eat.

When bringing in caterers or mobile traders you should check with the appropriate local authority that they are registered for food safety.

It is also advisable for anyone arranging events to check the Food Hygiene Rating that has been given to a trader. The higher the rating the more confident you can be that food is being prepared safely - under the scheme a score of 3

indicates a business is “Generally satisfactory”, a score of 4 indicates they are “Good” and a 5 means they are “Very Good”.

These checks can be done quickly online via the Food Standards Agency website at <http://ratings.food.gov.uk/>

**TOP TIP**

Once you have agreed the date, make sure that you inform everyone who will be able to help you deliver the event, including all key stakeholders.

## Step 5: Set your Budget

### Your budget

You may have a great idea for an event, but you need to make sure it is financially viable.

You will need a budget to support your event clearly setting out costs and income, including any ticket sales, funding or sponsorship you hope to achieve. A template for setting out your budget is available with this toolkit.

Start with an outline budget using indicative costs and your proposed sources of finance, and firm up the detail once you start to get income information and quotes from suppliers. To help you manage your event's finances, it's a good idea to keep a 'live budget' on your computer, such as a spreadsheet, that you update on a regular basis to make sure there are no surprises.

Costs may include fees and licenses, and you may be asked to put up a returnable deposit if your event is on private or public land or premises to cover any damage.

As with any plan, financial responsibility must be clearly allocated, including who is liable in case things don't go so well. Set out responsibilities clearly in contracts with suppliers, funders and sponsors. For larger events, financial procedures must meet relevant accounting and audit requirements and be designed to ensure the event is financially viable.

### Sources of income

There is a range of options for you to consider in raising the funds you need. You may use funds within your organisation, you may charge attendance or for bigger events, you might need to consider grant funding or sponsorship.

**Grant funds:** There are a number of on-line funding resources which may be a useful starting point such as [www.grantnet.com](http://www.grantnet.com), [www.grantfinder.co.uk](http://www.grantfinder.co.uk), and [www.fundingcentral.org.uk](http://www.fundingcentral.org.uk).

The Tourism Team at Bridgend County Borough Council can advise whether any grant funds are available to specifically support events that attract visitors to the area. You could also consider approaching the Welsh Government's Major Events Unit (MEU) which provides funding for major events in Wales; the Big Lottery Fund which provides funding to support a range of good causes including projects that improve health, education and the environment and the Arts Council of Wales which provides a wealth of funding advice, guidelines and directory on the many sources of funding for the arts in Wales.

Each funder will have their preferred application process, but some things are common to all of them. When applying, make sure that you:

- Understand their criteria for allocating funding, make sure you meet the criteria and show this within your application;
- Find out from the funder how you apply to them. It might be an application form or maybe a letter with a project outline;
- Know how much you can apply for, ensure you are realistic about how much you require and that any budgets you enclose with your application are correct;
- Complete all of the application and enclose any additional evidence that they request;
- Always keep a copy of your application form and any additional documents for reference.

**Sponsorship:** Businesses provide a further opportunity for supporting your event. In return for sponsoring your event, a business partner will need to receive a commercial return for their investment, and they will expect value for money. When thinking about sponsorship you need to think about how your event can help them fulfil their objectives.

Obtaining sponsorship from a business involves a strategic plan together with a professional approach. To sell yourself to a business you must consider how much time, effort and resources you are prepared to allocate. In considering timescale, remember many businesses plan their budgets a year or more in advance so your planning needs to begin well ahead of that.

If you are successful in securing funding, make sure that you keep your funder up to date with how the project is going. Even if things aren't going as planned, they may be able to help or offer advice. Ensure that you invite them to any events, launches or openings.

**Sales income:** Set up clear and transparent procedures for managing income from the event, including security and cash handling on the day; as well as procedures for dealing with invoices, payments and relationships with suppliers, sponsors and funders. Be clear about inclusion or exclusion of VAT.

**TOP TIP**

It's a good idea to keep a contingency fund of about 5% in case of unforeseen costs.

## Step 6: Do your Marketing

Marketing is about communication. The marketing behind an event can make a huge difference to the numbers that attend and the impact it has. The starting point will be to develop a marketing plan.

A **marketing plan template** is available to download at [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events).

Begin marketing your event as early as possible. Think back to the work you did in step 3 identifying your target audience and as soon as the event has a set topic, title, description, date and venue you are in a position to start devising a marketing campaign - a planned promotional activity over a period of time

It can be split into four components often referred to as marketing's four P's: Product, Place, Price and Promotion.

**Product** - Make sure that what you are offering is what your target audience is looking for.

**Price** - Ensure that the price is set at the appropriate level to meet with your target audience's expectations.

**Place** - Make sure that you are placing your marketing activity in the right places, where your target audience is likely to come across it.

**Promotion** - Be sure to use the right tools to promote the event including a mixture of online, broadcast, face to face and print.

This is about more than getting people to come to an event or performance; it's also about building customer loyalty, so once you've got your customers on-board, you can monitor and evaluate what they do, and communicate with them on a regular basis.

There are a number of different ways to get your event message across to your target audience and you'll need to ensure that you meet any funders' requirements on your promotional materials.

**Events Calendar:** Register your event with [BridgendBites.com](http://BridgendBites.com),

**Flyers:** Small, one or two-sided leaflets are a cheap way of distributing information and may be photocopied or printed, depending on your budget. Ask to leave your flyers at libraries, cafes, shops, supermarkets, gyms, early childhood centres, schools, doctors' and dentists' surgeries, churches, and at businesses (including your sponsors). Distribute the flyers at other events, particularly those with related themes.

**Advertising leaflets:** Speak to local businesses about including event information in their regular newsletters or leaflets, perhaps as part of a sponsorship package.

**Posters:** Design these so as to attract attention, yet contain the main information (time, date, venue, description of the event) and credit any sponsors. A4 or A3 size posters are the best size for display purposes. Smaller sized posters are easily missed. Any larger and many shops and outlets lack window or wall space to display them.

**Speak directly:** To groups such as church groups, Rotary, Lions, schools and business networks.

**Create a website:** With links to your event, competitions, performers, location, sponsors and links to social networking sites such as Facebook and Twitter.

**Social Media:** Social media is becoming an increasingly popular tool to market and promote events. By using social media on websites such as Facebook, LinkedIn and Twitter, you can promote your event by creating discussion forums and comment to create a 'buzz' surrounding the topics and speakers at your event. Activity such as blogging and additional discussion forums are valuable for post event comments, and will prolong the exposure of the event online.

**Print advertising:** As well as daily newspapers, consider advertising in community newspapers which will have cheaper rates. Think also about magazine advertising, particularly magazines that align with the interests of your target audience. Sponsors will sometimes help with advertising costs in return for naming recognition.

**Radio:** Local radio is a lively means of communicating with a local or regional market. It has the advantage of immediacy and can be used to distribute new information. Single spot and series announcements need not be expensive and can be used to generate immediate responses. In addition, 'on air' interviews can enliven radio schedules and help spread your message at no cost.

**Television:** Television advertising may be too expensive for the majority of events, although local television has competitive rates but with smaller audiences. If a promotional video of high technical quality has been produced it will be possible to create a 15 or 30 second advertisement from the footage using a recorded voice over to promote the event. As with radio, local television news desks are always looking for local community activity – and it's free!

### **Working with the media**

The media can be a very effective way to get your information out to the public.

The main types are:

- Print media
- Radio
- Television
- Internet

To work effectively with the media, you need to have a named contact who is able to write or speak clearly about the purpose and importance of your event and why it is of interest to your audience. Identify what points of difference your event has that the media will recognise as newsworthy and exciting. Write a

number of key media releases, focusing on these points to entice the interest of reporters and try to 'drip feed' information to maintain interest.

Your media release should concisely outline the details of your event. The release can include a quote from an appropriate person to help to present the message of your event. Remember to provide that person's name and position and, if necessary, explain the relevance of the person making the statement.

## Step 7: Get feedback and evaluate

At your event, collecting information about your event and those who attended will help you with a number of things, for example:

- Establishing how successful your event has been;
- Informing marketing and public relations activity;
- Reporting back to budget holders and your funders; and
- Planning for future events.

Visitor numbers will give you an idea of the popularity of your event but direct feedback from people who attended or helped to deliver your event is the most valuable way of assessing how well it went. It's also important to learn from things that didn't go so well to inform future event planning and design.

With well-designed research you can help build the reputation of the event. It's a good idea to track media coverage, such as print and broadcast media articles, online comments and social media sites to get a feel for the event's success too.

Some funders may specify key performance indicators, evidence requirements or measures that you have to meet as a condition of funding and this will need to be taken into account to ensure you are meeting the funder's requirements with the evidence that you collect.

### **What information do you need to collect?**

Think about the information that you would find useful when planning a future event and meeting the needs of your audience. You might like to know things like:

- Where they have travelled from and how they got there;
- What they thought about the event and any suggestions they have to improve it;
- Whether they would come to the event or visit the area again;

- More detailed feedback about the facilities, catering, access, entertainment, helpfulness of stewards etc.;
- How they found out about the event;
- Socio-economic data (age, gender, employment status, ability). This helps with marketing and also accessibility equalities requirements.

### **How do you collect this information?**

Depending on whether or not you have collected contact details, which you might have done on booking or on arrival, you could collect your data via:

- Feedback forms at the event;
- Face to face interviews;
- Telephone interviews; and
- Online survey.

Social media is increasingly being used to gauge reactions. For example, you could create a Twitter account to promote the event, and then set up a hashtag (#) which can be used to promote the event live and track comments. Or you could set up facebook page, or a page on a website where you update event information, and encourage comments and feedback.

### **Estimating audience size**

You'll need to have an estimate of audience size for planning the event, to assess attendance levels for your survey sampling and to feed in to your evaluation report after the event.

### **Counting on the day**

To estimate attendance on the day you could use numbered ticketing at the entrance, programme sales or a clicker system at the entrance or exit.

Things to bear in mind include:

- It's easier if your venue has clearly defined entry/exit points
- How you collate the information
- People arriving or leaving at the same time can make it difficult to keep track
- Take care not to count people twice

## Gathering Views

Your sample size and design is a critical consideration. The 'population' is everyone you are interested in – i.e. everyone who attended the event, but it's impractical to get feedback from everyone, so the answer is to take a smaller sample that can be representative of the population of attendees, and will give a reliable overview of the wider population's views.

If you are using feedback forms or self-completion questionnaires, design is critical: it needs to be clear, with box-ticking responses, although do leave space for comments. Avoid leading questions, where the wording of the question could influence the respondent's response.

Consider the types of questions that will be most useful. Open questions invite more qualitative responses; and closed questions that just require a yes, no – or selection/tick-box from pre-defined list can be easier to track. You can use tick boxes, and if you are seeking reasons or comments make sure there is enough room for the response.

Ranking can be a useful tool in evaluating satisfaction, with the scoring set out clearly. A balanced 1-5 ranking is often used, for example where:

- 1 = Extremely dissatisfied
- 2 = Dissatisfied
- 3 = Neither dissatisfied nor satisfied
- 4 = Satisfied
- 5 = Extremely satisfied

There is a **Visitor Survey template** available to download from [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events).

## **Evaluation**

Evaluation is about assessing whether your event achieved its intended aims. Use it in the planning process, for keeping on track, giving a picture of the event in retrospect and helping you learn for the future. It is also a way of assessing the impact that the event has had.

Staging events can provide a strong economic return on investment through the attraction of visitors to a host region. The **economic impact** of an event is therefore a critical measure particularly in securing public funding support.

Events can have a variety of **environmental impacts** in the areas of waste, carbon and sustainability. It is increasingly important for event organisers to understand the scale of these, in order to best develop systems that manage them.

The **social impact** of an event concerns its effect on the people and communities around which it takes place. These include the development of skills and volunteering, inspiring participation and delivering satisfaction.

The **media impact** of an event is related to the amount of media coverage achieved by that event.

An **Evaluation Report Template** is available to download from [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events).

### TOP TIP

The **eventIMPACTS** toolkit has been developed by a number of organisations and provides some key guidance and good practice principles for evaluating the social, economic, environmental and media-related impacts associated with staging major events and festivals. It can be downloaded at [www.eventimpacts.com](http://www.eventimpacts.com) and is targeted primarily towards event owners, funders and event industry employees across the UK.

## Step 8: Become Sustainable

### Resource Sustainability

For your event to be truly financially viable, you will need to understand where your budget will come from in future years. Often, grant funding is only available for the first few years of an event and it is likely to be less money each year.

You may have had some success with private or public sector sponsor partnerships or have generated some income from ticket sales and you can use these as feasible options for taking your event forward in future.

You will also need to consider who has been involved in delivering your event up to now and whether they plan to continue supporting your event, particularly if they are volunteers. It is important that you provide the right support and training for your team to maintain their enthusiasm and continued support for your event.

You may also consider somebody else taking over the management of your event in future, particularly if it becomes too big for your team to manage.

### Environmental Sustainability

Sustainable event management can help in planning an event responsibly, taking into account concerns for environmental, economic and social issues. There is now a lot of guidance available and a British Quality Standard (BSI-20121) to work to.

It needs to start at the inception of the project, and should involve all the key players, such as the event organisers, venues, sub-contractors and suppliers. Whatever the size of your event, you can adopt a similar approach to health and safety risk assessment, using a checklist and establishing the likelihood and scale of an impact affecting people, the environment or local businesses.

Some events may include positive sustainability impacts, such as raising awareness of environmental issues and supporting local business.

You must meet legal requirements, and a systematic approach can help ensure your event is compliant with environmental regulations, for example waste Duty of Care regulations; and that it does not cause pollution for example from a spillage of cooking oil or milk leaking into a watercourse.

You could make a top level statement, for example *“To make the event as sustainable as possible”*, or, you may want to back up your top level statement with more detail, for example:

*“We will make our event as sustainable as we can by making sure we adopt a responsible and well-informed approach to understanding and reducing negative impacts on people and the environment, and by maximising its positive impacts. We will have a systematic approach to make sure we comply with all relevant regulations, and prevent environmental damage.”*

Once you have established what the most important issues are you could include more specific aims, such as *“We will...”*

- Reduce traffic
- Reduce impact on neighbours
- Prevent contamination of water courses (river, sea, groundwater, etc).
- Leave the site in good condition
- Reduce energy use and CO<sub>2</sub> emissions
- Calculate the event’s carbon or ecological footprint
- Reduce transportation mileage (delivery to and from site);
- Reduce the need for waste disposal
- Reduce water to landfill Food Safety and avoidance of contamination.
- Prevent nuisance to neighbours
- Build community engagement; promote benefits to local people.
- Maximise the value of the event to the local economy

- Promote healthy food: safe practices in food prep promoting healthy eating
- Promote local food growers and suppliers.

A **Sustainability Assessment Template** with further guidance is available to download from [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events).

## What Next?

The Bridgend County Events Portal at [BridgendBites.com/Events](http://BridgendBites.com/Events) has a range of further useful tools for organisers planning events in the Bridgend County Borough area, for example help to find a venue, help with listing your event and an active events calendar to help you choose the right dates for your event.

### Register of Venues

A number of venues are available within Bridgend County Borough, in both private and public ownership that may meet your venue requirements. **Bridgend County Borough Council** has a variety of parks, pitches and open spaces, many of which can be used to host a range of events, and a list of these is available online at [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events).

### Free Event Listing Service

You can increase exposure for your event by submitting it to the **BridgendBites.com** events calendar, simply complete the fields in the online form. Please note that all events are subject to approval and to be included must add to the county's appeal as a visitor destination.

These are some examples of events which will **not** be included:

- Permanent attractions / exhibitions
- Community targeted activities, e.g. quiz nights, sports clubs, car boot sales etc.
- Education / social courses

There is no charge to have your event listed and it will usually take about 7 days for your event to appear on the [BridgendBites.com](http://BridgendBites.com) website once it has been confirmed that all permissions and licenses are in place..

## Events Calendar

A number of exciting events take place within Bridgend County Borough throughout the year. Visit [www.BridgendBites.com/Events](http://www.BridgendBites.com/Events) for an up-to-date list of the major events in the County.

## Templates

Templates to help you plan each step of designing and implementing your event can be found on [BridgendBites.com](http://BridgendBites.com).

List of available templates:

- Budget
- Evaluation Report
- Event Checklist
- Event Plan
- Marketing Plan
- Risk Assessment
- Sustainability Assessment
- SWOT Analysis
- Visitor Survey

## Useful Contact Information

### Contact Information for Bridgend County Borough Council

Throughout the toolkit we have referred to a number of teams within the local authority that can help or advise with particular aspects of your event planning.

#### **BCBC Main Reception**

Civic Offices, Angel Street, Bridgend CF31 4WB

Tel: 01656 643643

Text Relay: 18001 01656 643643

Email: [talktous@bridgend.gov.uk](mailto:talktous@bridgend.gov.uk)

Twitter: @bridgendcbc

#### **Architectural & Engineering**

Waste Collection & Disposal: 01656 643419

#### **Building Control**

Structures/ Buildings: 01656 643406

#### **Corporate Services**

Entertainment Licensing: 01656 643105

#### **Countryside and Tourism Team**

General event planning and funding advice: 01656 815333

#### **Education, Leisure & Community Services**

Arts & Entertainments: 01656 642685

#### **Public Protection**

Health and safety, food safety, trading standards and noise control:

01656 643260

### **Transportation & Engineering**

Traffic Management: 01656 642523

### **Parks and Playing Fields Service**

01656 642721 or 642723 email: [parks@bridgend.gov.uk](mailto:parks@bridgend.gov.uk)

### **Licensing**

01656 643109 or 643294 email: [licensing@bridgend.gov.uk](mailto:licensing@bridgend.gov.uk)

If you would like further advice on anything specific, you can contact the following organisations directly:

#### **South Wales Police**

They can advise you on crowd control, public order, emergency access and traffic management.

Community Safety, Bridgend Police Station **01656 655555**

#### **South Wales Fire Service**

They can advise on fire safety matters, how to contact the emergency services, marshalling of spectators and traffic in emergency conditions, local access for emergency vehicles and provision of on-site fire- precautionary and fire-fighting arrangements.

Fire Safety, Western Division, Celtic Court, Bridgend. **01443 232000**

#### **Welsh Ambulance Services NHS Trust**

Contact the Welsh Ambulance Services NHS Trust or voluntary First Aid society to arrange attendance and provide first aid cover (you may have to pay for this service).

Locality Officer, Bridgend Area **01792 562900**

#### **Maritime & Coastguard Agency**

Maritime Rescue Co-ordination Centre, Swansea **01792 365300**